KELMS INSTRUCTOR GUIDE

2015.1

Kentucky Enterprise
Learning Management System

Personnel Cabinet
Governmental Services Center
10/9/15

Kentucky **E**nterprise **L**earning **M**anagement **S**ystem (KELMS)

KELMS was implemented in 2015 through the installation of SumTotal's Learning Management Solution (LMS) to replace the PATHLORE Learning Management System at Governmental Services Center. KELMS "go live" date was 7/1/2015.

KELMS is an enterprise-wide system that can be used by and configured for all state entities.

KELMS will allow agencies to manage the training processes based on their needs.

- Employees will be able to access their own skills, take charge of their learning and have access to their training transcripts.
- Managers can access training histories to guide team development.
- Leadership can use the training data provided to evaluate skill gaps and/or workforce strengths when needed.

For additional information, please go to:
https://gsc.personnel.ky.gov/Pages/TrainingKELMS.aspx

Contents

Introduction

KELMS is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through KELMS, you are provided with instant access to online learning courses, schedules and details about traditional learning events, as well as access to performance support and knowledge documents.

Objectives of this Guide

In this document, you will learn how to use KELMS for finding, creating and managing your agency's learning. You will also learn about performance management tasks.

This guide offers insight into how Learners, Managers and instructors, and training coordinators use the system, how to create efficient training structures that are easy for your Learners to use, and how to make decisions about reporting based on the options built within the system.

KELMS Overview

Learner mode provides many features. Below is an overview of the feature groups and how you can use them to increase your knowledge and your productivity.

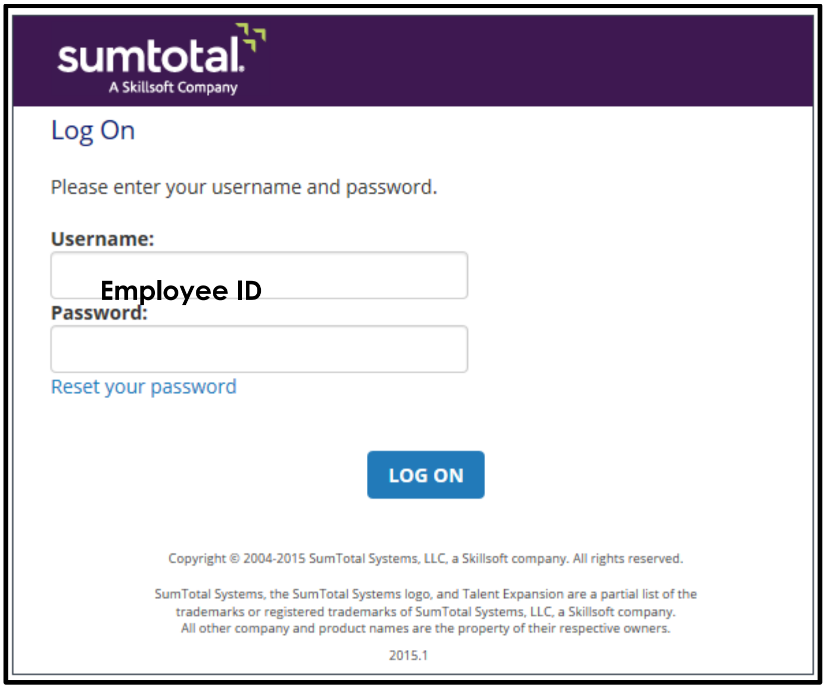
- **Training**: You can access online courses, instructor-led training, seminars, documents and more in one easy-to-use location.
- **Performance Management**: Using KELMS, you can map skills, competencies, and development plans against your company's business objectives. You can manage your career and growth through alternate job analysis and personal development plans.
- **Collaboration Center**: Using a collaboration center, you can access experts and peers for quick answers to questions or clarification of course material. Expert responses to your questions are automatically captured and stored in a knowledge base, providing an ongoing, searchable source of information for everyone. These expert question and response capabilities make it easier for you to acquire the knowledge you need so that you can get your job done faster.

Prior to completing this class, you must have completed the following training:

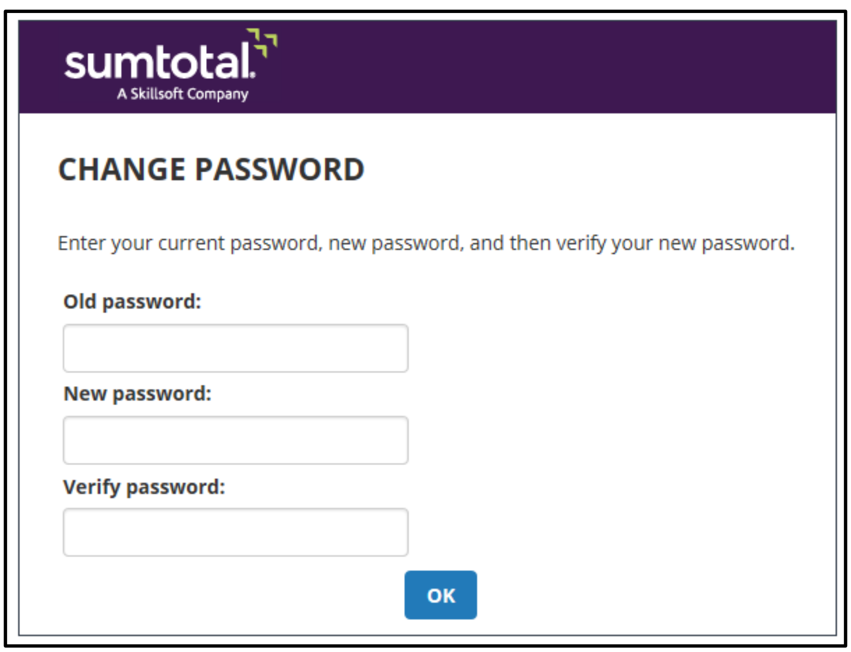
- KELMS Basics of Navigation
- KELMS Manager Basics

Logging on to KELMS

The first time you access the **Log On** page, you will be prompted to enter the username and password that have been assigned to you. Your user name will be your Employee ID number which is a mix of alphanumeric. (Some know it as an eMARS or KHRIS ID)



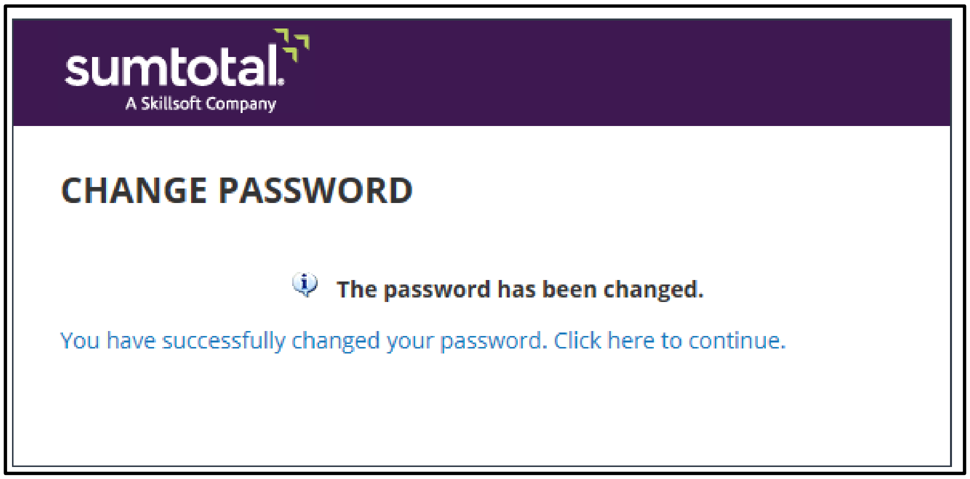
You will then be prompted to change your password.



Enter your Old Password. This is the password that that you will receive in your email from the KELMS System Administrator after completing this course.

Enter your New Password. It should be at least 8 characters long, one capital letter and one number.

Verify your password. This is to confirm that you entered the information correctly.



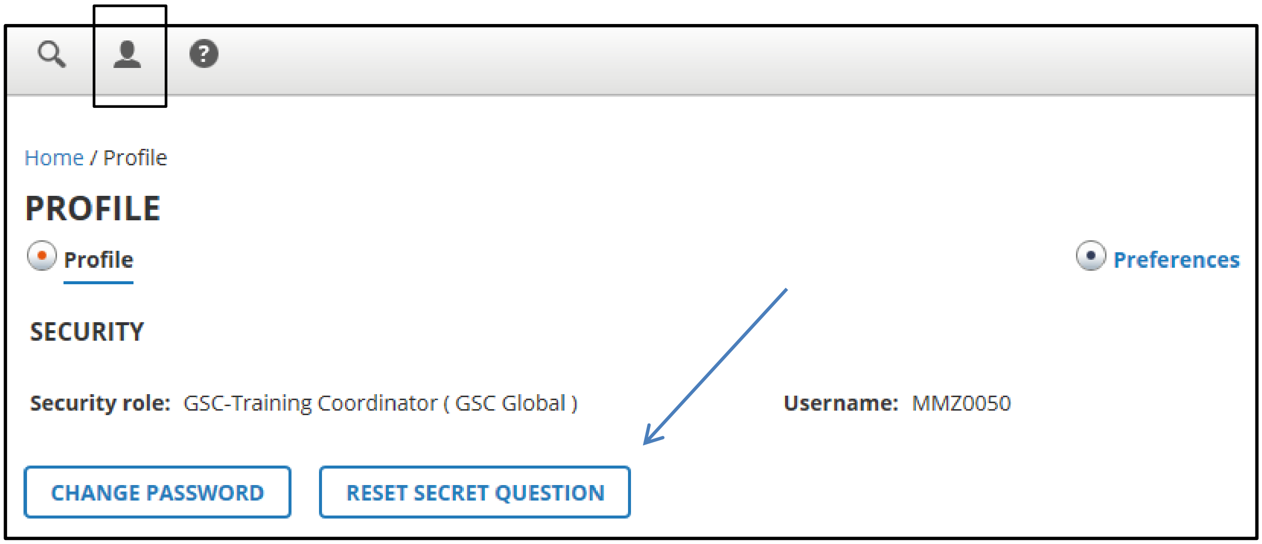
Once logged in, you should immediately go to your profile to set up your security question.

Setting up a security question allows you to reset your password using the "Reset Your Password" on the login page.

You can access your profile by clicking on the Profile  link in the upper left hand corner once you have logged in.

The User's Profile and Preferences

A user must set up their security question and answer in their profile if they want the ability to reset their password online. The user may also click on the preferences radio button to change their time zone or any other settings they feel are wrong. Information in the profile is imported from KHRIS. Users should note any incorrect information and inform their Human Resource contact.



It's ok to make a note as to what your secret question is so that you won't forget. As long as you don't disable your login when attempting to login to KELMS, you can reset your own password anytime you like.

IMPORTANT: If you need assistance with Password resets or other Technical issues that you cannot resolve contact your agency Training Coordinator or Designated Support Contact (DSC) via email at KELMSDSCGROUP@ky.gov.

A list of Agency Training Coordinators can be found on the KELMS Webpage at: https://gsc.personnel.ky.gov/Pages/TrainingKELMS.aspx

Important Reminders for Production

1) Go to your Profile & Set your Secret Question.
2) Double check your email address. Email address changes MUST be made in the KHRIS ESS System. The KHRIS Import happens at 12:30 A.M. every day.
3) Click on Preferences & double check your time Zone.

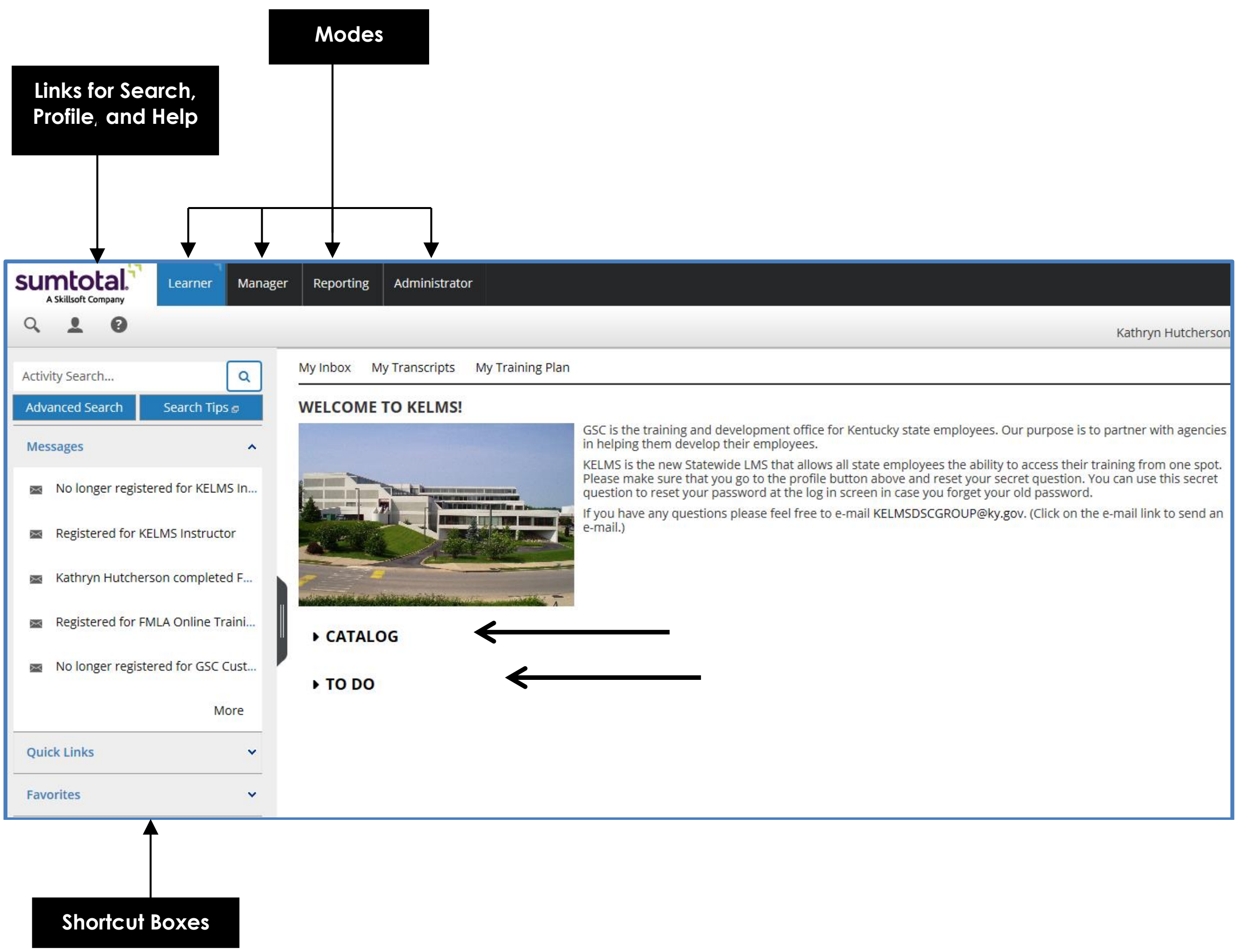
Exploring the KELMS Interface

After you login to the system, you will see the KELMS Home Page or what's often referred to as the Learner Dashboard. From the dashboard a Learner can access their training information, messages and favorites.

The Learner home page has two major sections:

Left Section: Provides quick access to Search, Quick Links, Favorites and Pending Activities

Right Section: Displays My Inbox, My Transcript, My Training Plan, News, To Do Section and Catalog.



The Home page (Learner Dashboard) offers the following options:

Options	Descriptions
Modes	As an Instructor, you should see 4 modes on your screen. Navigate to a different mode by clicking the appropriate button. Up to seven modes may be available depending on the permissions granted to you.
Profile & Preferences	Use this option to view your personal profile information. This information will be updated by the KHRIS import and will not be available for you to modify. If you have concerns about information that appears to be inaccurate, please contact your agency Training Coordinator.
Search	Find the training you need quickly by using the KELMS search feature.
Location Path or Bread Crumb	Use the location path to navigate to other pages quickly. A quick glance at the location path will tell you where you are in KELMS.
My Inbox or Messages	Use this menu to view notifications messages from KELMS. KELMS will also send notification to your Outlook email.
My Transcript	Use this menu to view all classes completed in KELMS. Your messages can also be found in the short cut boxes at the bottom left.
My Training Plan	Use this menu to access your development plan information.
My Calendar	Use this menu to view your scheduled trainings on your KELMS calendar. (see your transcript, look at the catalog etc)
Learn Menu	This is another way to look at some of the same information. Use this menu to access your learning-related activities.
Plan Menu	Use this menu to access your development plan information.
Collaborate Menu	Use this menu to access collaboration centers. (not available)
My To Do List	Navigate to your training and performance related tasks.
Catalog	Access the catalog to look for training related information such as courses, knowledge documents and so on.

About User Modes

Depending on your role in KELMS (Manager, employee, and so forth) you may access different pages that appear in different modes. Each mode provides features for specific roles, such as the ability to publish training to the system or to manage employee information. If you have permission to access features in more than one mode, you can switch between these modes by choosing one of the mode buttons at the top of each page. In this document, we will focus on Learner mode.

The following table displays mode names, descriptions, and corresponding mode icons.

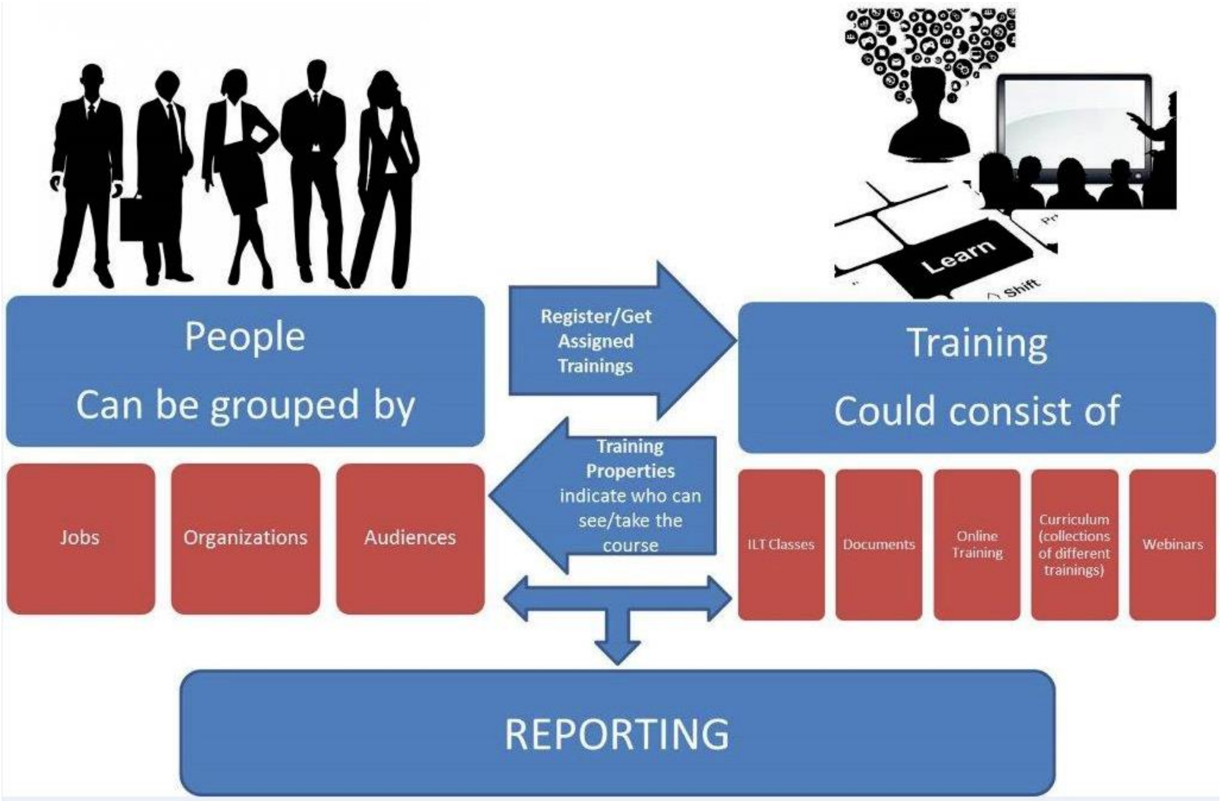
Modes	Descriptions	Mega Menu
Learner	Provides access to training and learning activities available to you.	
Manager	Provides information about training and performance related information for users that Managers are allowed to view. Reports are available for individuals and workgroups. Ability to view and manage training and performance data for direct reports Run and view reports to track status of assigned training Managers can switch view to Learner's home page • View the training catalog, view pending signatures, view transcripts, view outstanding training, register Learners for training • Can't complete training on behalf of the Learner	
Administrator	Allows users to create, manage, and configure all components that are tracked by KELMS. Employees with permissions to publish online training use this mode to make training available. Utilized to configure KELMS structure and all related objects, security roles,	

	resources, training, learning activities, skills, users, jobs, collaboration centers. Allows the user to switch domains
	○ This option is not available in Learner or Manager modes
	
	Can be configured to accommodate different levels of access
	○ Based on permissions
	○ Examples:
	    ○ **System Administrator** - system and domain configurations
	    ○ **Instructor** – Offerings of learning activities and their related objects
	    ○ **Training Coordinator** - learning activities and their related objects
	    ○ **Domain Administrator** – domain, users, and learning activity related objects	

Reporting	Provides interactive reporting and analysis for measuring the impact of training within an organization. View and print reports ○ Choose the type of data to view by selecting parameters ○ Export reports to PDF, XLS, XML, TIFF or CSV formats ○ Create reports using the Report Authoring Wizard ○ Publish custom reports developed using Microsoft Visual Studio Bids ○ Apply filters ○ Restrict access to a report by assigning an audience ○ Schedule reports for delivery via email	

Working as an Instructor

Graphical Overview (Map) - Key Processes



The basic workflow for KELMS revolves around you delivering training to your users. The jobs of your users will determine how you group them into Organizations in the system. The jobs, organizations or even individual users can be used to create new audiences for assigning training.

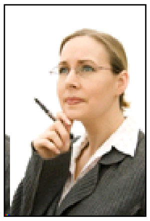
Learning activities are any training opportunities that are created in KELMS. It can be any digital document or SCORM package that the Training Coordinator uploads; It could be a virtual class scheduled in the system, it could be an instructor-led course that will be held at the central training facility, an on-the-job training class run by a Manager on how to use specific equipment, or a training class run by a vendor specializing in technical skills.

Ultimately you will attempt to determine how much learning was accomplished by assessing your users and reporting on their outcomes. Assessment of learning is covered in this user guide.

Reporting is an integral part of KELMS, and so there will be discussions of reporting considerations. For example, what types of reports are commonly available and what types of reporting might require more complicated report or data set domain creation. However, in depth coverage on how to create reports and data sets domains using Advanced Reporting will be covered in future training classes.

User Overview – Instructor

You are developing learning solutions that help your agency develop a stronger, compliant workforce. But when people log in, what do they do? The following section introduces you to the types of roles most agencies use. You can also use this section to help train Learners, Managers, instructors and Training Coordinators once you are ready to deploy KELMS to your Learners.



Instructor

The role the Instructor plays in KELMS is varied. You may be a trainer or human resources manager that needs to create a new class for a training your agency offers. You may be an Instructor for one or more domains.

This guide covers essential processes, best practices and common mistakes, and reference tables for quick useful information.

As an Instructor, I want to:

- Register employees for a class (both Instructor Led and Online)
    - GSC, KEAP, KHRIS and other Personnel Cabinet Trainings
    - eMARS
    - Agency specific in-house training
- Create agency specific classes for your staff to enroll in.
- Assign the training or have the Learners register
- Let the Learners know about training
- Monitor training that you are responsible for
- Print and manage rosters for trainings for which you are responsible
- Look up learner transcripts
- View earner activities

  Add external training to a learner transcript
- Assist Learners with using KELMS

IMPORTANT – 2nd Reminder:

1. If you need technical assistance, please contact your Agency Training Coordinator or contact a Designated Support Contact (DSC) through the following email **KELMSDSCGROUP@ky.gov**

Finding Learners and Activities

Learner Records

Everyone in the system is a Learner, and every active Learner record holds a license within the system.

Learner records are imported into KELMS every morning from KHRIS to provide updates to the Learner records. When an employee is no longer active, their Learner record will be marked inactive on the data load through the import process. This will release a user license for the agency.

IMPORTANT: Not all contract or quasi employees are in KELMS. It is always best to look for the Learner record first. If your agency has a need to train and track training for a contract employee who is not in KELMS, contact your Agency Training Coordinator and define a way to track that training outside the system until a decision is made to purchase additional license. Training histories will be maintained in the KELMS system when the Learner is marked inactive.

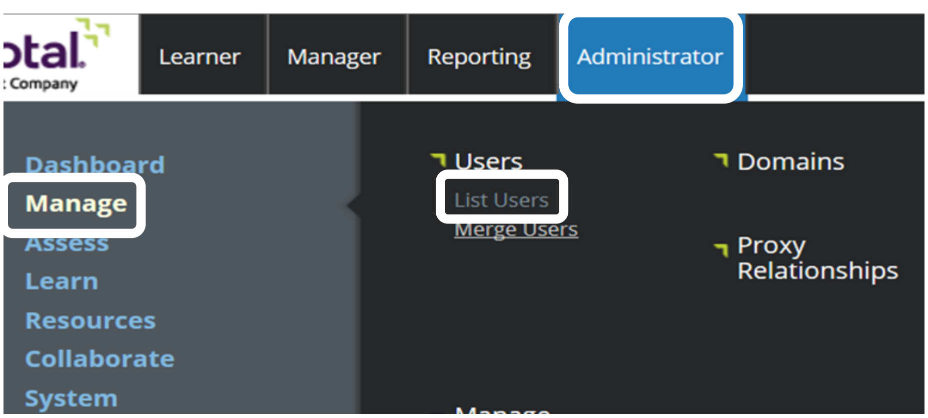
Learners are housed within the KELMS domain structure. As an Instructor, you should only be able to view the Learner records of the employees who are located within your domain, or possibly just your organization. We will talk more about domains and organizations as we continue through this training course.

In the exercise below, you will learn how to locate and view a Learner record in KELMS.

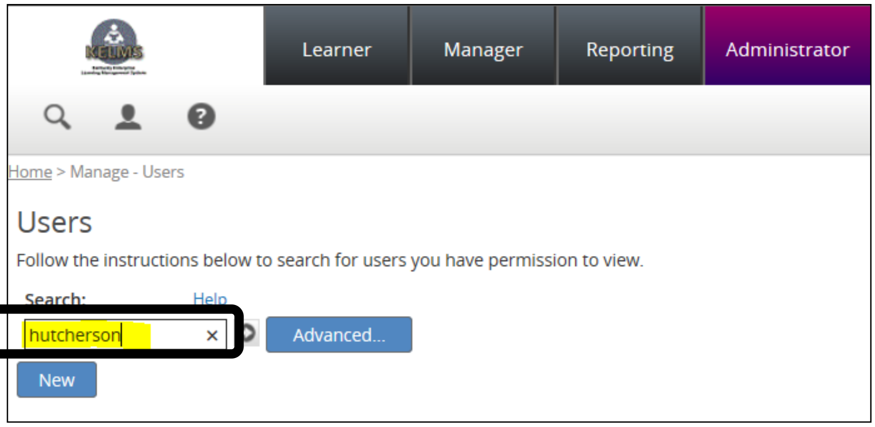
Exercise 1 – Find & View a Learner Record

► **Follow the below steps to find and view a learner record:**

1. Hover the mouse over the ***Administrator*** tab.
2. Hover the mouse over **Manage** in the drop-down menu.
3. Click **List Users** under **Users** in the options that appear to the right of the Menu.



4. The *Users* page will appear. Type the learner's name in the *Search* box to search for the desired learner. **Click the Go**  button.



Note: You can type any combination of last name and first name in the S*earch* box and the search result will display the names in your domain according to the current records stored in KHRIS. If you leave the *Search* box empty without typing any text in it, once you click the **Go** button, it will return the names of all the learners.

5. **Find the name** in the list of returned names and **click on the name to open the User Summary page**

6. The **User Summary page** reveals all the information retrieved from the KHRIS Import.

<u>KHRIS Import:</u> The daily KHRIS import will maintain your employee data records. If there is a discrepancy you should notify your Training Coordinator, or have the individual update their information in KHRIS (ESS). Your Human Resource Generalist (HRG) can assist if needed.

If you are a "quasi" agency whose employee records are not maintained in the KHRIS System, your agency Training Coordinator will need to create the employee records in KELMS.

The same thing is true for Contract employees and possibly teachers who are not already in KELMS. Before requesting the creation of the person record, please ensure you have searched KELMS first, to see if the training record is already in the system. **REMEMBER: Each Learner will take a license and you will be responsible for notifying your Training Coordinator who will need to create the person record in KELMS and also mark them as inactive when the contract employee is terminated or leaves your agency.**

Training histories for employees who terminate their employment will be maintained in KELMS and can be reactivated should they return to work.

Locate Training

Using the Catalog to Find Training

The **Catalog on your Learner Dashboard** is your Domain's catalog. Here you can see the categories created by your Domain which contain courses and classes that are available to your organization from the KELMS database.

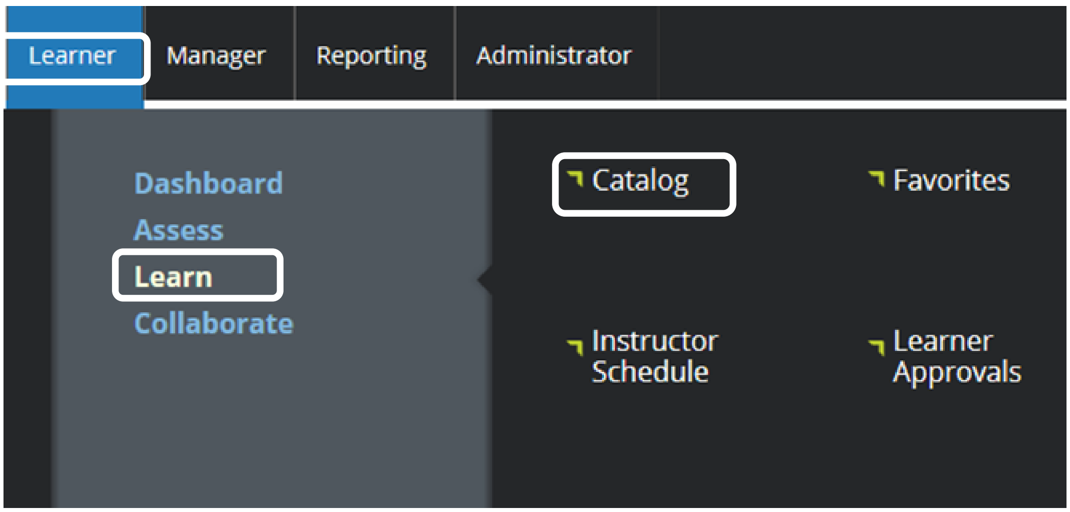
To see the **Global Catalog,** hover over **Learner>Learn> (Click on) Catalog**. This is where you will find the "state-wide" training offered to all agencies throughout the Commonwealth. Example: GSC, KHRIS, eMARS, Personnel, Budget (OSBD), etc.

Note: If the creator of the activity does not assign a category, you may not be able to locate it through the catalog search. If this happens go back to the Learner Dashboard and search for the activity.

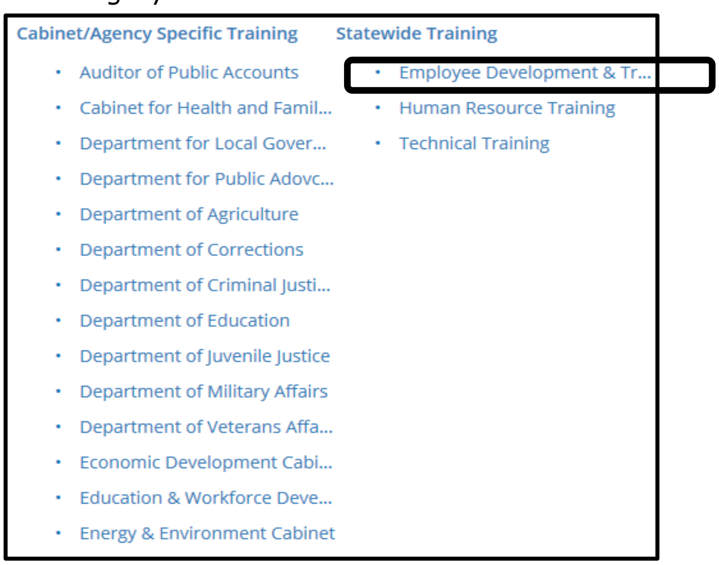
Exercise 2 – Using the Global Catalog to Locate & Register Yourself for an ILT Class

► To use the Global Catalog to locate an ILT Class:

1. **Hover the mouse over the Learner mode.**
2. **Hover the mouse over the Learn menu.**
3. **Click on Catalog.**



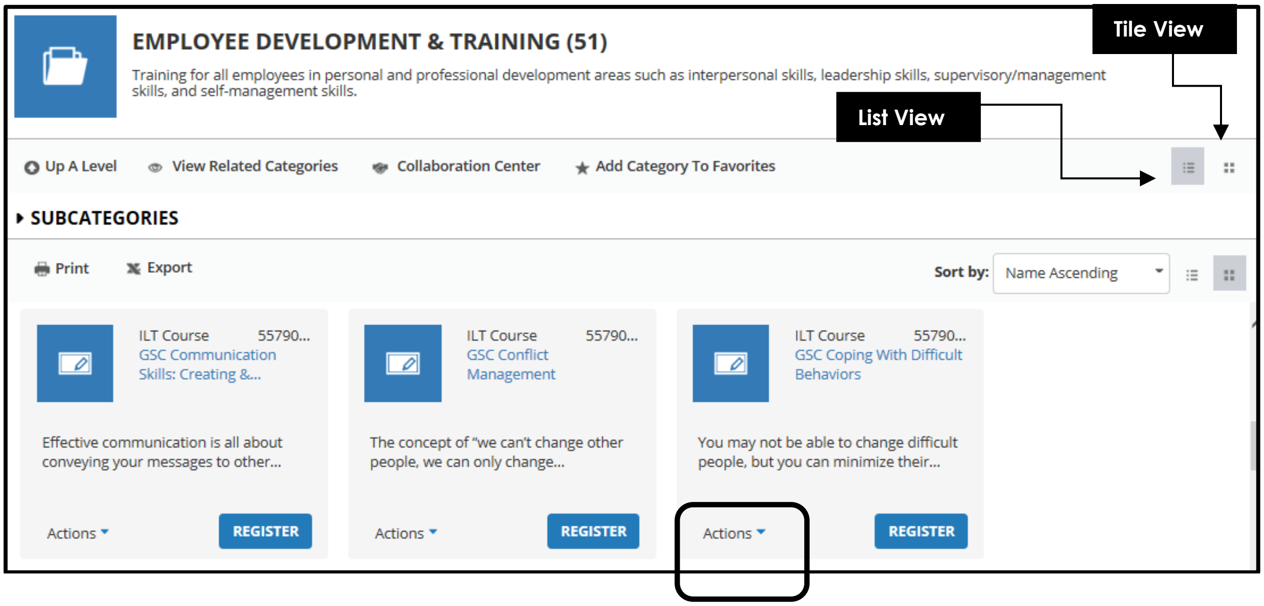
The **catalog categories will appear** with a list of ILT Courses organized alphabetically beneath each category.



4. **Select the Category you wish to search from (Refer to your Student Card)** a list of ILT Courses will appear.

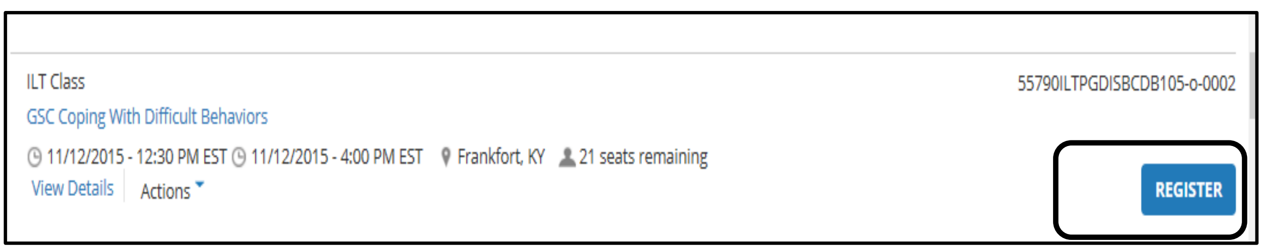
5. When you find the ILT Course **Hover over Actions.**

6. **Select "View Subactivities."** To view all the class offerings available for that particular course.



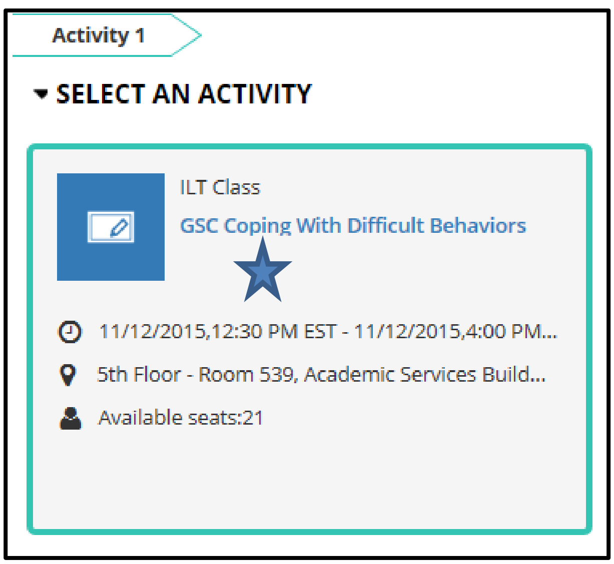
7. **Choose** the class date and time you want.

8. **Select Register** to register yourself for this class

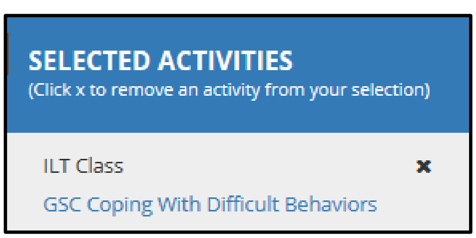


The "SELECTED ACTIVITIES" page will appear.

9. **Click** in the white space under the class name to select the class. Selecting the class will place a green box around the class.



10. **Click Next**



11. **Click Submit**

After clicking Submit, you may have noticed that KELMS communicated with your Outlook to send a notification to you informing you of your class registration. It also may have tentatively marked your calendar for the scheduled training date.

Congratulations! You have completed the registration process.

The activity details screen will appear to provide you additional information about your registration status and activity progress.

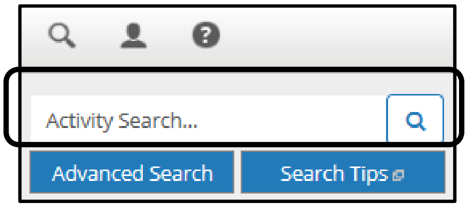
12. **Click Done.**

You can now go to the Learner Dashboard and see your class registration in your To Do List.

Note: After completing the registration process, the system will send a registration confirmation notification to the learner to inform them of their registration in the class. At the bottom of the notification is a link which will allow the learner to add the training to their Outlook calendar.

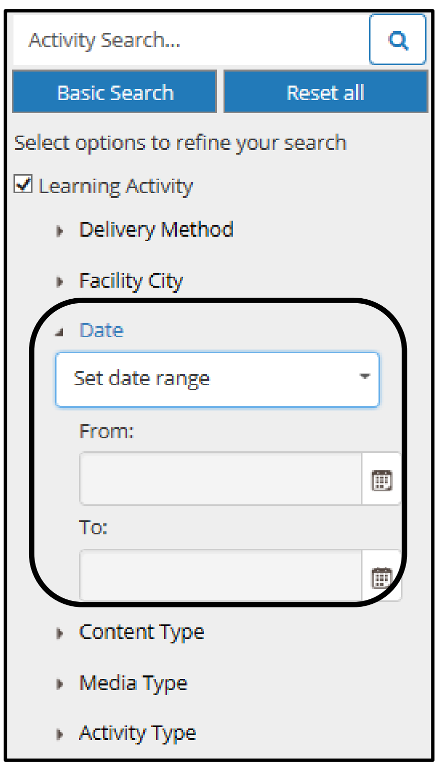
Using Basic Search

You can use basic search feature to find the training of your choice. Type the name of the class in the search box and search results are displayed.



Using Advanced Search

Sometimes you may want to locate items by a certain set of criteria, such as by location or delivery method. The advanced search feature helps you refine your search. You can filter your search using multiple criteria such as activity type, content type, media type, delivery method, location, date, or additional options.



Exercise 3 – Using Advanced Search to Register Others for an ILT Class

► To use the Advanced Search feature:

1. From the Learner Dashboard, **click Advanced Search** below the Activity Search box.

2. **Click on Date.**

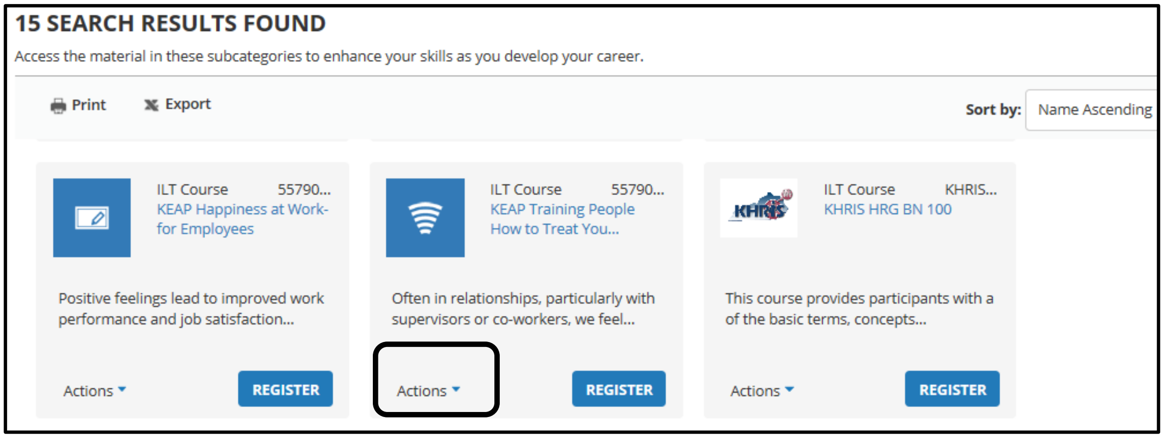
3. **Select "Set Date Range"** from the drop down. **(Refer to your Student Card)**

4. **Enter** the From/To date by using the Calendar.

<u>Important</u> – You cannot type the date in, you must use the calendar.

5. **Click Search (Magnifying Glass)**
   a. The search will return everything the system can find that falls in this date range.

6. **Locate** the activity you want. **(Refer to your Student Card)** & **Hover over actions.**



7. Select **View Subactivities** to see all the available offerings of this course.

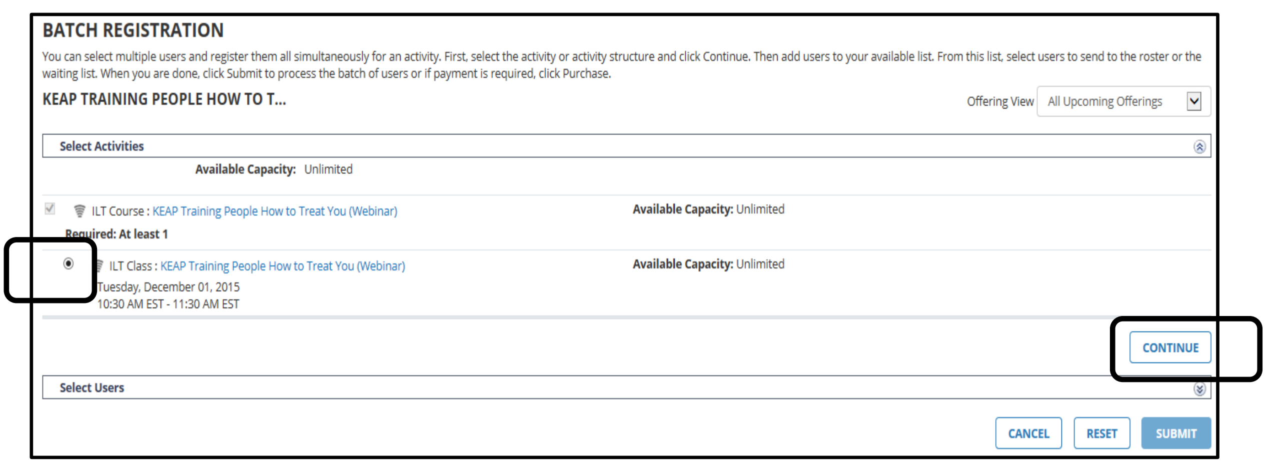
8. Locate the class date you wish to register others for **(Refer to your Student Card).**

9. From the Actions Menu, **Click "Register Others**".

The Batch Registration Screen Opens. This will allow you to select multiple users to register for an activity.

10. **Select the Radio button** beside the class you wish to register the users.

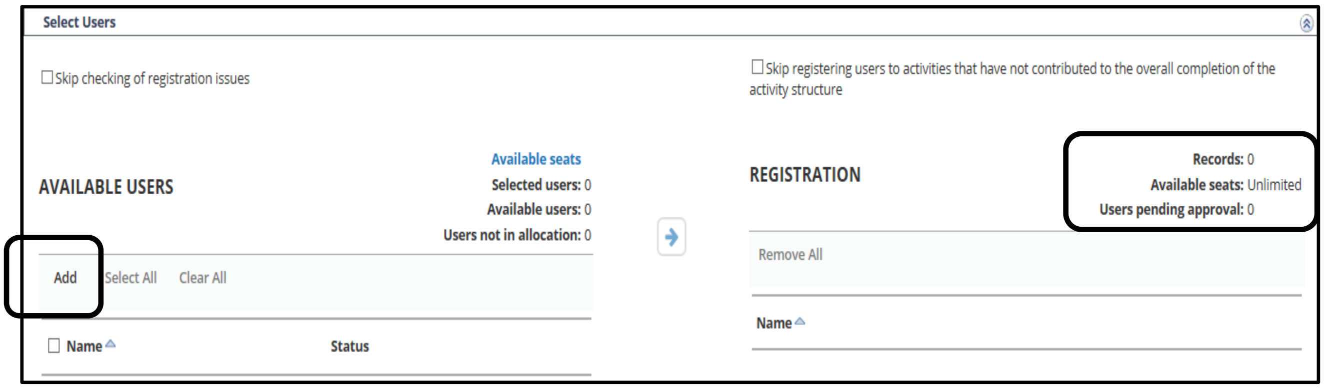
11. **Click Continue button and scroll down.**



The Batch Registration Screen expands at the bottom to allow you to select the available users for the class.

Observe the available seats in the class on the right hand side of the screen.

12. **In the "Available Users" box, click the Add button**



13. **Select viewable users (default). This is where you decide "how" you want to search f**or a learner in the system

14. **Click Next**

15. **Search for the learn name** (you can search by email address, employee id, etc.)

16. **Check the box** beside of the first name you find, then go back to the search window and enter the next name you need. Place a **check in the box** for second person as well. The KELMS will remember all those for whom you have checked the box.

17. **Click done** when you are finished selecting the names.

18. **Click the top** ⇨ in the middle to move your selected available users to registration; Click on the bottom arrow to move them to the wait list if the class is full. **(Pay attention to the selected users in the Available Users box. Make sure you don't have too many people selected.)**

19. **Click Submit**. DONE!

<u>Notifications:</u> Within 3-5 minutes a notification letter will be sent out by KELMS notifying the learner of their registration status. The user who registers the learner for the class will also receive a copy of the notification letter that goes out to the participant.

Creating Learning Activities

Learning Activities

Learning activities are different forms of training in KELMS such as:

- Documents
- Online courses
- Instructor-led classes

All learning activities have general properties and attributes that determine their behavior.

By default Instructors can only create offerings of Instructor Led (ILT) Courses. Offerings of ILT Courses are call ILT Classes and are times and dates when that ILT Course is being offered.

If you have online content that will need to be uploaded, or any of the activities on the next page that need to be created, contact your Agency Training Coordinator.

Why can't instructors create any type of activity?

Activity Codes are the basis for maintaining accurate reporting capabilities. By limiting course code creation to 1-2 people per domain, it limits the possibility that the Course Code guidelines will not be followed.

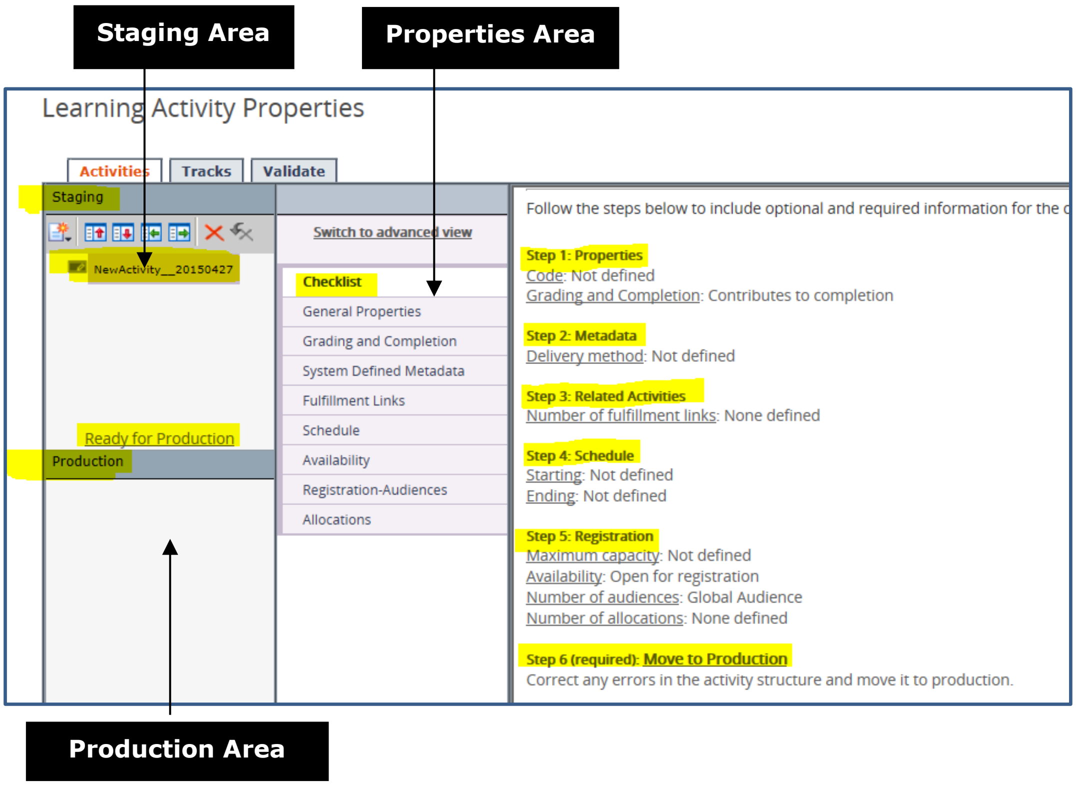
Activity	Description
Class (TC)	This activity may be self-directed or facilitated. You can create a single class and schedule a date and time. It is one of the simplest stand-alone learning activities in the system. (Easy after the fact training)
Course (TC)	This activity can be used for on-line content. Most content that you upload becomes a course by default. The exception is knowledge and general documents, which become documents by default.
ILT Course (TC)	This activity is a template for **instructor-led training**. **Create it as a stand-alone activity and reschedule it as necessary by creating new ILT classes.** You can also use ILT Courses in curricula for blended learning. As such, it is a **good place to start.**
ILT Class (TC/I)	Create this activity based on an ILT course activity. Each time an ILT course is offered, you will want to create a separate ILT classes within it. These **ILT classes offer** distinct training to Learners, including **specific dates and times for each ILT class**. Each ILT class also includes its own **roster of registered Learners**.
Session (DAYS)	This activity is not stand-alone but is offered as part of a class, especially if there are multiple days, locations or instructors.

Quick Assessments (TC)	Use this simple activity to **create assessments to track student knowledge.** These are flexible activities that you can use for pre- or post-assessment. You can connect them to other activities or offer them as stand-alone knowledge checks.
Curriculum (TC)	Use a curriculum to **define a learning path** that identifies the required objectives and the order in which these objectives should be completed. It is best used after you create the learning activity courses contained in the curriculum and also ensure they can be subscribed to. (CSE – STAR – ACADEMY)
Objective	Use this activity type to organize learning activities within a curriculum and support blended learning.
Topic	This is another way to group learning activities. Use topics within a curriculum or outside a curriculum. You also use them to modify options that make it easier for a Learner to register.
Versional	If you need to update training frequently, consider setting up a versional activity. This activity **holds records for all versions of an activity.**
Self-Reported Training (TC/I)	Use this activity type if you want Learners to track training taken outside the LMS. (Learner does not have the ability to use this function).
CE Requirement Group	This activity allows you to organize the course-level activities into groups of continuing education requirements.
CE Credit Category	This activity allows you to organize class-level learning activities into categories that count toward continuing education credits.
On-the-job training (OJT) course (TC)	Create an OJT course activity to allow Managers to report training they have provided to their employees. Once an Administrator establishes the OJT course, Managers can create an OJT class each time the training is offered to an employee.
On-the-job training (OJT) class	Administrators or Managers with permissions can create an OJT class each time an OJT is offered. It can be created before or after the occurrence of the actual activity.

Learning Activity Properties

The Learning Activity Properties page opens, see the screen shot below.

There are 3 sets of properties that are essential for you to create this class. They are as follows: **Staging Area, Production Area** and **Properties Area**.



- **Staging Area**
  Contains the name of the class or learning activity with which you are creating. As you can see from the screen shot above the new activity is in the Staging Window. Once all updates have been made to the class in the properties area (name your class, activity code, date, location, resources, etc..) and you are ready to allow Learners to see and register for the class, it is ready to send to production. **As long as the class is in Staging, it cannot be seen by Learners.**

- **Production Area**
  Production is the location where a class or learning activity must reside in order for Learners to see and register for the activity. In order to modify the class/learning activity, you must move it back to Staging. After modifications have been made, the class must be moved back to Production again.

- **Properties Area**

  Properties contain General settings which allow you to set the name, course number, course image, instructor name, audience, etc. Choosing a category of properties from the middle column on the page displays the associated properties in the workspace to the right.

Things to Always Do!

When creating an ILT Class always:

1. Click on "Switch to Advanced View"
2. Fill in the following properties in each category: (Mandatory if Bolded)

FOR AN ILT CLASS:

Properties that must be addressed

A. Properties: General

Mandatory	Optional
• **Class Name** • **Activity Code(Should be auto generated)**	• Activity Image: If you want to add a picture in your Catalog tiles • **Contact** • **E-Mail Personnel** • **Keywords:** This will help individuals find course in the Catalog. When asking for the ILT Course to be created, please include any keywords that may aid in finding the class

B. Properties: Status

Checked	Unchecked
• **Active** • **Hidden from search results** • **Can be Copied**	• **Canceled** (Unless class is cancelled) • **No Registration Required** • **Hidden in Manager Mode** • **Hidden from Transcript** • **Can be fulfilled**

C. Properties: Notes

Mandatory	Optional
	• **Instructor Notes** (Not Mandatory but STRONGLY Suggested) • **User Notes** (Not Mandatory but STRONGLY Suggested) • **Registration Notes** (Not Mandatory but STRONGLY Suggested)

D. **Properties: Certification (Only mandatory if an ILT Course is a Certification) All fields should be reviewed.**

E. **Properties: Grading and Completion**

Mandatory	Optional
• **Contribute to parent activity completion** • **Estimated Duration** • **Estimated Credit Hours**	• **Required to be completed** • **Minimum percent**

All others should be left alone in this field list

F. **Schedule: General** (This will be where the time and date are setup, as well as the deadlines for registration and cancellation. You can also set up the time zone in this property group.)

Mandatory	Optional
• **Start Date and Time** • **End Date and Time** • **Registration Deadline Date** • **Cancellation Deadline Date** • **Time zone(If applicable, unless in Western Kentucky, the time zone will be (America/New York))**	• **NONE**

G. **Registration: Availability (Set up at the ILT Course Level)-** Registration can limit who can see the training in the Catalog AND who can register for the trainings. This is typically done by course, but if you have a specific class that you are offering for a particular subset of individuals, you can limit who sees it.

Mandatory	Optional
• **Open for Registration** • **Maximum Capacity (If you want to limit enrollment)**	• **Minimum Capacity- If you want the ability to cancel classes if the enrollment is too low.** • **Requires Approval(If you want Training Approval)** • **Designated Approver (IF one is not already assigned, you can select the person that is responsible for the training. Note: This is a person responsible for the training. This is secondary to an approval process that may be set up for an employee.**

To create a specific audience, you may need to contact your Training Coordinator.

H. **Registration: Allocations** can allow you to "hold" training seats for a specific group of individuals. You can "hold" these seats for a limited time before releasing them to the entire registration audience. If a specific audience is needed, you may need to contact your Training Coordinator to create that audience.

I. **Resources:**

   i. **Resources: Instructors**
   ii. **Resources: Locations**
   iii. Resources: Vendors
   iv. Resources: Equipment

You should always add the Instructors and Locations for training. If the resource you are trying to add is missing from your choices, you will need to need to contact your Training Coordinator and ask them to have those resources added.

Categories and Properties that you should not need to add anything

(PAY ATTENTION TO THE BOLDED PROPERTIES BELOW)

The Categories/Properties that are listed below do not necessarily need for you to enter any information. You may want to look at those that are bolded in order to verify that the parent ILT Course was set up correctly.

J. Translated Properties (For language translation purposes) If you want to add alternative language instructions for class description, registration instructions.

K. Metadata (Optional but encouraged) These 3 property sets can help users use advanced catalog searches by choosing if the information presented is a CD, Instructor Led, Computer Based, etc.

L. Costs (Not currently using, but could use if you have costs associated with your trainings.)

M. **Related Activities (ONLY Continuing education)**(All of these parameters should be determined at an ILT Course Level. You do not need to be worried about this. These properties allow courses to fulfill other courses, and curriculums to include these courses.)

   i. **Continuing Education- If continuing education credits are being offered for this ILT Class, confirm they were entered at the course level.**

N. **Registration: Audience, Registration: Evaluation: (Audience and Evaluation property groups)- (Set up at the ILT Course Level)- These should be set up at the Course level, but if you ever want to limit the audience that can see and register for the training, you can use the audience parameters. A new audience will have to be set up by your training coordinator.**

O. **Registration: Prerequisites (Prerequisites property group) – (Set up at the ILT Course Level) This limits who can register for a course based on prerequisites set up at an ILT Course Level**

P. **Registration: Evaluation (set up at the ILT Course Level) Allows you to assign an evaluation to the ILT Class**. Online evaluations are typically associated with online Courses, but you could set up online evaluations for the ILT Classes as well.

Q. **Management- (Set up at the ILT Course level.) ASSIGNS the class to a specific group of individuals. If you need the specific class you are offering to be assigned to a specific group/organization, etc., contact your local Training Coordinator. This is especially useful for assigning New Employee Orientation to new employees. This system will allow you to create audiences that will automatically assign training to individuals.**

R. **Remote Content Server –Are used for configuring Adobe Connect or WebEx trainings**

S. Versioning (ILT COURSE Level)- This can automatically track versions of training, if content has changed.

ILT Class Offerings

As an Instructor, you will create all your ILT Classes based on ILT Course. Think of an ILT Course as the template that supplies the standard information regarding training. An ILT Class is a specific time and date where that training is offered by an instructor.

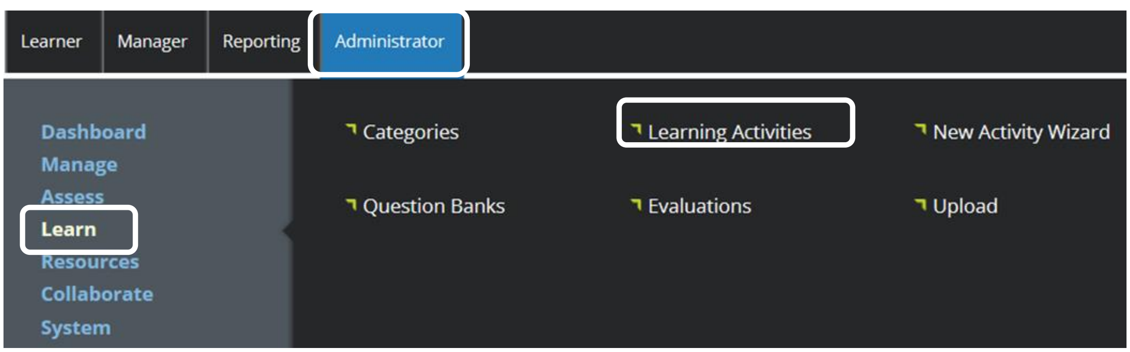
In this exercise you will learn how to create an ILT Class from an ILT Course. When you create a class you become the owner of the class. You must be the owner of a class or the trainer in order to manage the roster.

Exercise 4 – Create an ILT Class from an ILT Course

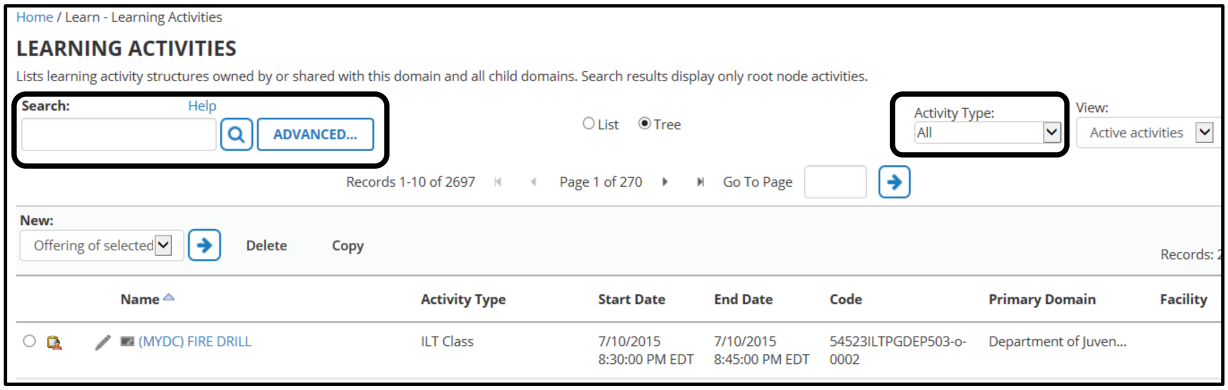
The below steps will teach you how to create your ILT Class from a Course. After you create your first unique ILT class, you only need to copy it for future class offerings.

► To Create an ILT Class Offering

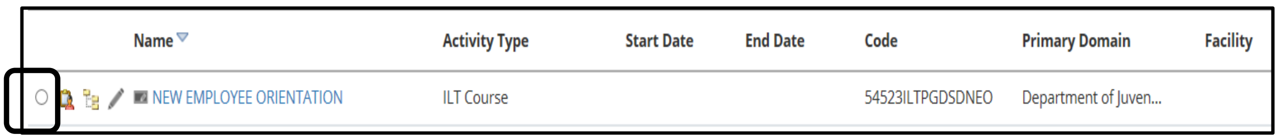
1. Hover the mouse over the **Administrator** tab.
2. Hover the mouse over **Learn** in the drop-down menu.
3. **Click Learning Activities** in the options that appear to the right of the menu.



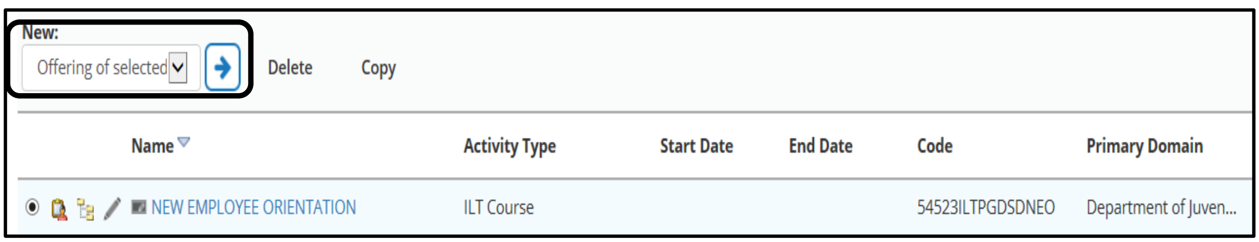
4. The Learning Activities page will appear. In order to create our ILT class, we must first find the ILT course to create our class from**.**



5. Change the **Activity Type** to **ILT Course.**
6. **Locate the desired ILT course** and **Click the radio button next to it.** (Refer to your Student Card)

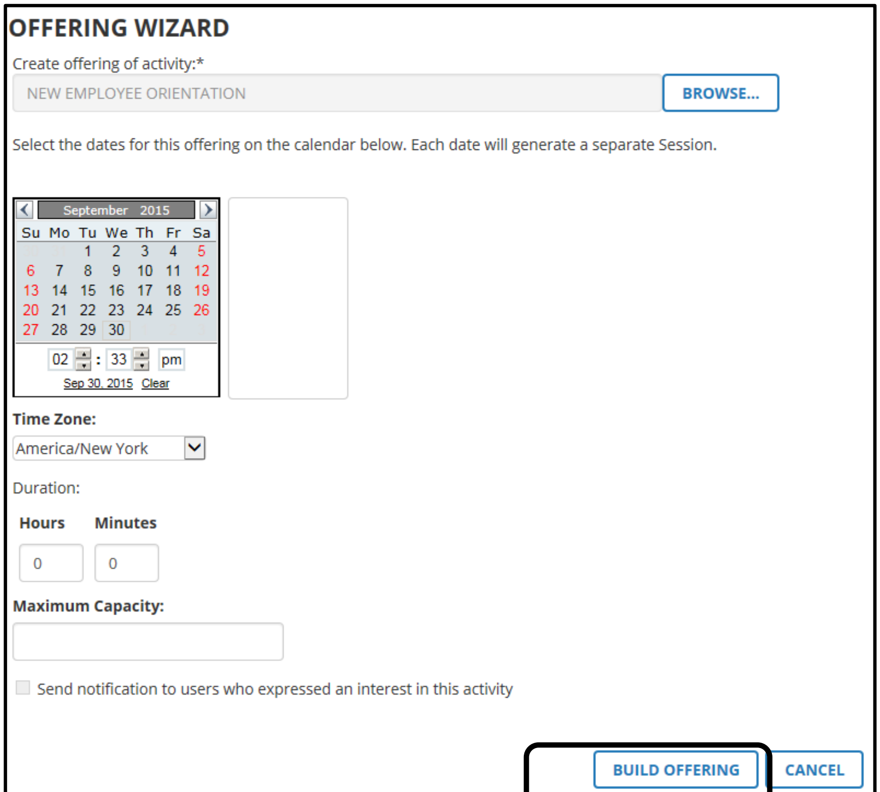


7. **Click the Go button** (arrow) next to the New box.



These steps are **CRITICAL** if you do not create the ILT Class in this way, the ILT Class will NOT be associated with the ILT Course.

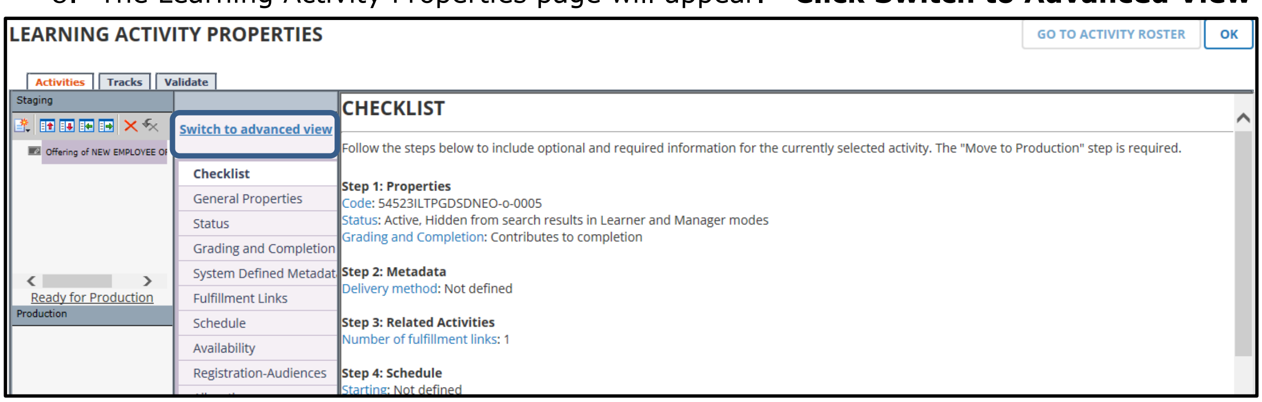
The Offering Wizard page will appear, **Click on Build Offering.**



Wizard Notes: If your class is a multi-day class, you may want to use the Wizard. Using this wizard creates multi-day sessions. Using sessions allows you to fine tune each day. When you create sessions you can change the properties for each individual day.

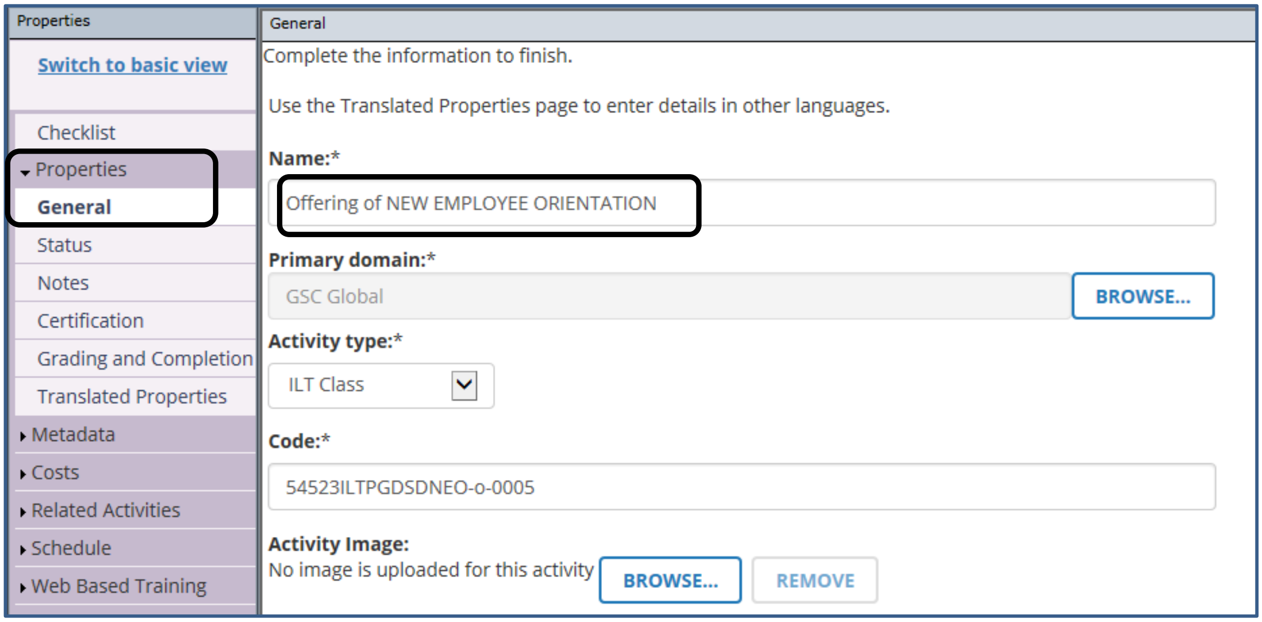
If the **Express Interest** button was checked on the creation of the ILT Course Template, checking the checkbox "Send Notification" will send a notification to any learner who had expressed interest in the class through the catalog.

8. The Learning Activity Properties page will appear. **Click Switch to Advanced View**



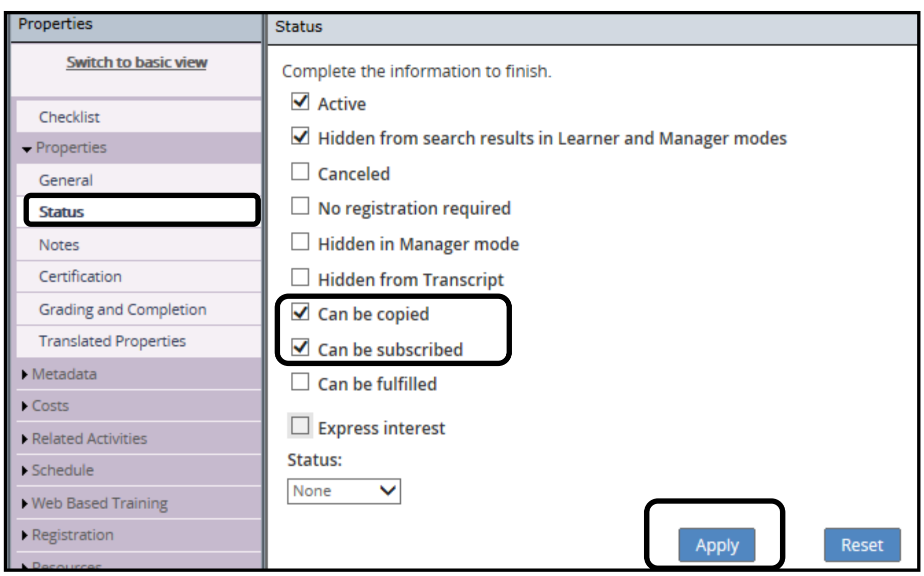
9. The advanced view of the properties will display.

10. **Click Properties and General.** **Delete** the text **"Offering of"** from the name. Do not change the code that is automatically generated for you. **Click Apply** to save the changes.



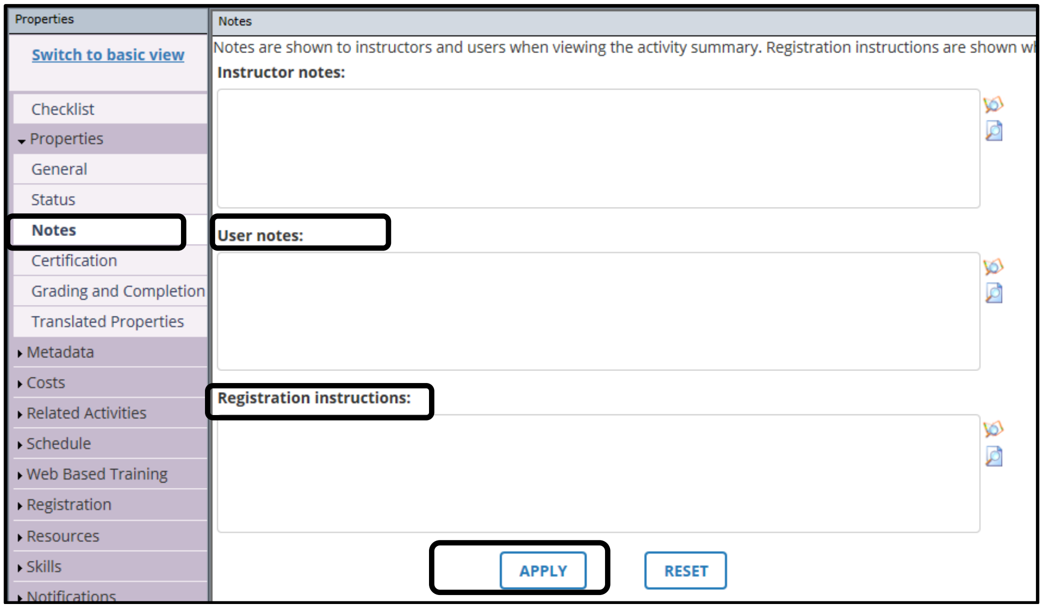
11. Click **Status** (located under **Properties**). Make sure **"Can be copied" is checked**. If this is not checked, you will not be able to copy the class.

12. **Can be subscribed** should also be checked.

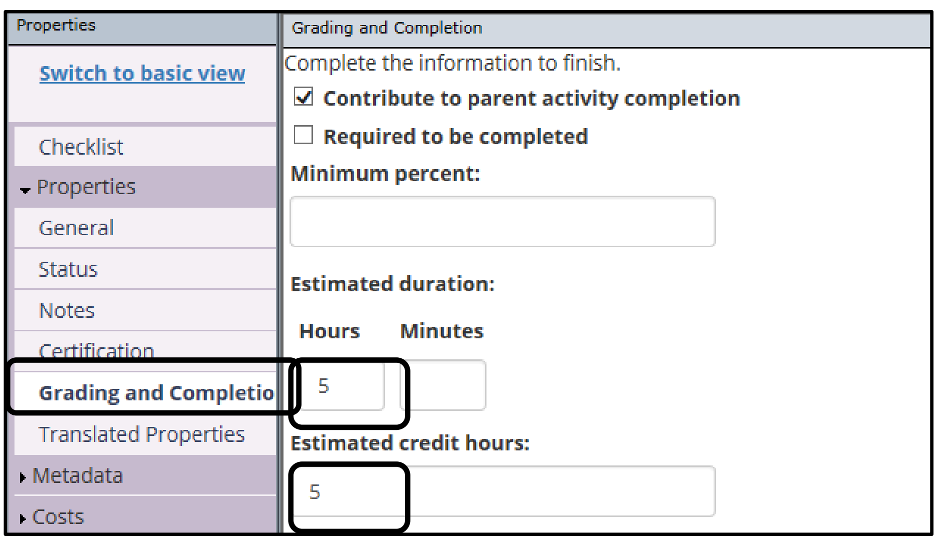


13. **Click Apply** to save your changes.

14. **Click Notes** (under properties). User notes and Registration Instructions both can be filled in. This information gets sent out in the registration notifications. You can add links and other information that you need to include in the registration notification here.

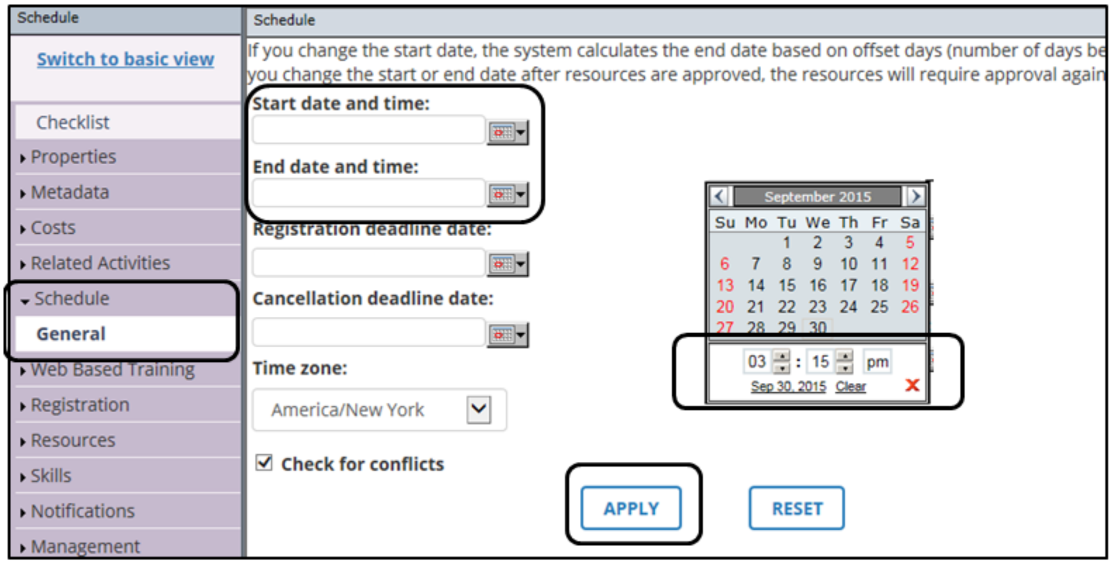


15. **Click Grading & Completion** (located under properties) **Enter Estimated Duration & Estimated Hours** ***(Refer to your Student Card)***

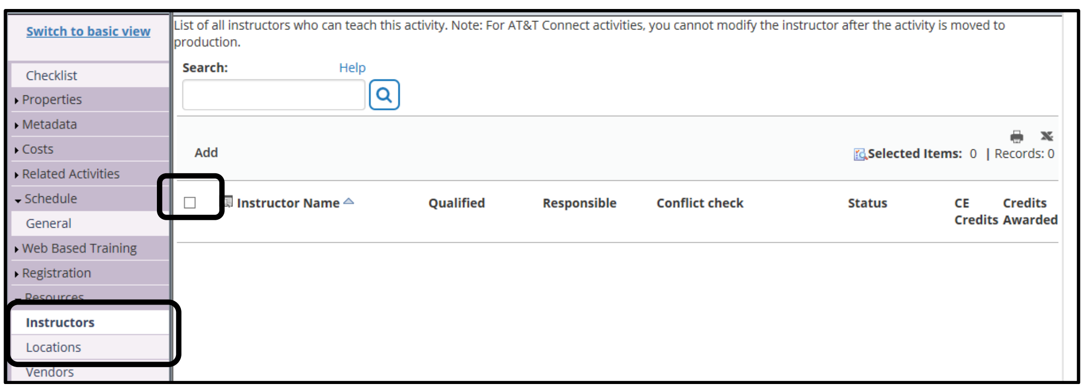


16. **Click Apply**.

17. **Click Schedule** and **General**. **Click the calendar** button to enter start date and time. A mini calendar will appear under the box. Use the mini calendar to select the desired month and date. Type in the desired time. Click the red X to close. Repeat the same for End date and time. (Refer to your Student Card).



18. **Click Resources** and **Instructors. Click Add** to see a list of the names of the instructors. You may want to use the Search box to search for an instructor. Check on the desired person. **Click Next. Click OK.** The selected instructor will appear on the page. Repeat this step until all instructors are added.

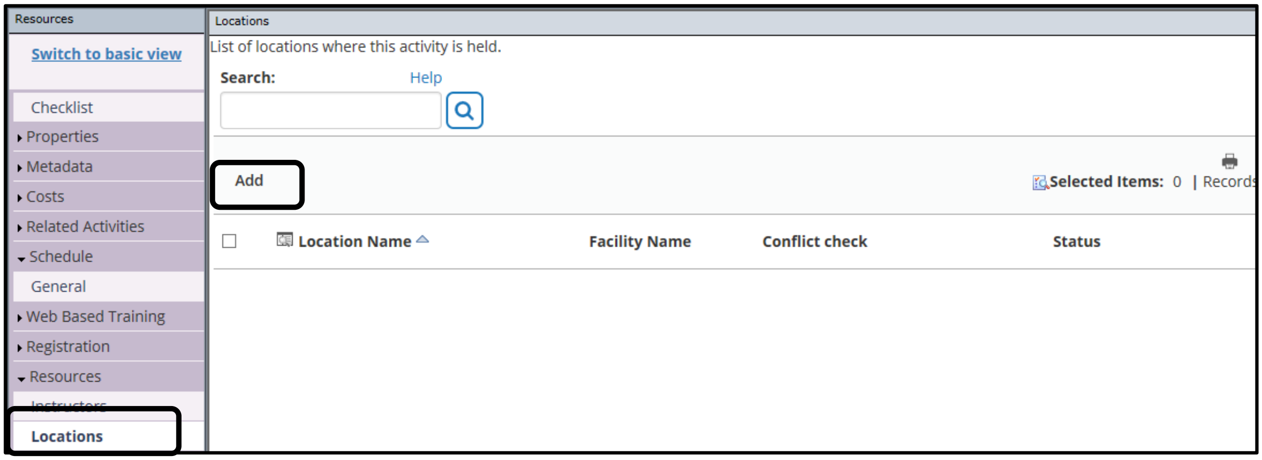


Instructors are a commonly used property.

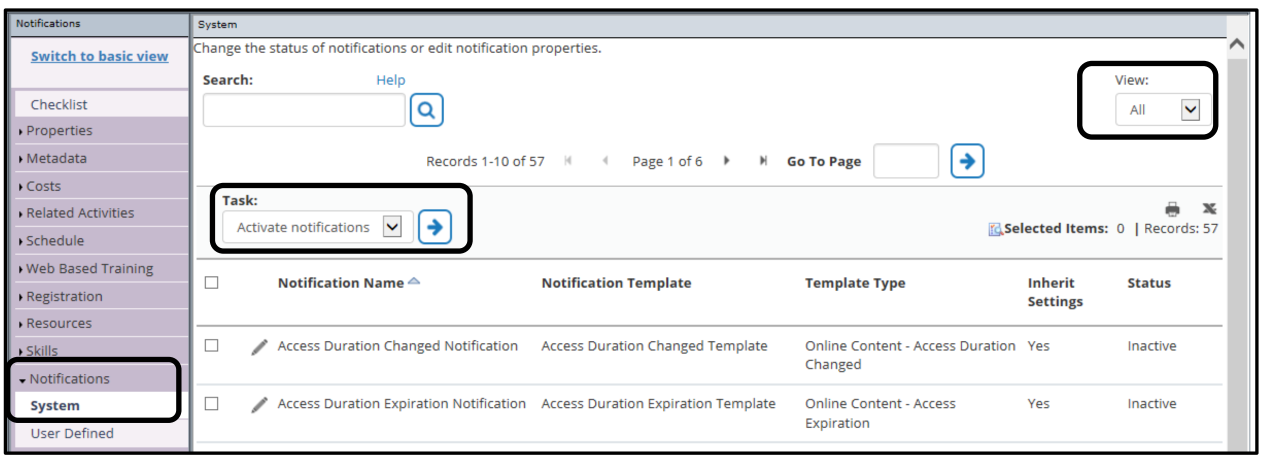
Adding instructors allows them to:

- **Get notifications when Learners register for their class**
- **Allows instructors to plan their training schedule**
- **Ensures instructors are not double booked**

19. **Click Locations** (located under Resources). **Click Add** to see a list of names of the available locations. **Type in the keyword** for the location in the Search box and **Click Go.** When the search result shows up, check on the desired location. **Click OK**. The selected location will appear on the page.



20. **Click Notifications** and **System**. **Click the down arrow** next to the **View box** and **Click Active**

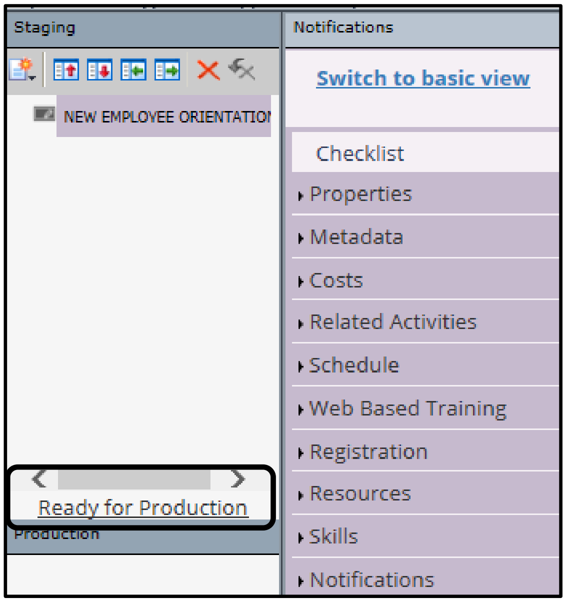


A list of active notifications will appear.

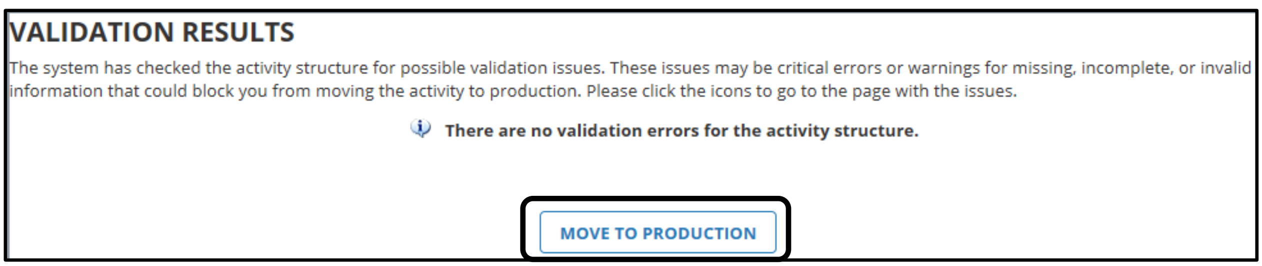
Note: If the activity you are creating has already happened, you will want to turn off (inactivate) some of the active letters. Otherwise, learners may receive notifications telling them they have been registered for a training class that has already happened. Look closely at the letters to determine if you need to inactivate them.

21. To inactivate a notification, **click the box** to the left of the active notification**. Click the down arrow** next to the task box. **Click Inactivate notifications** and **Click the Go button**.

22. **Click Ready for Production** at the left side of the screen.



23. **Click Move to Production**.



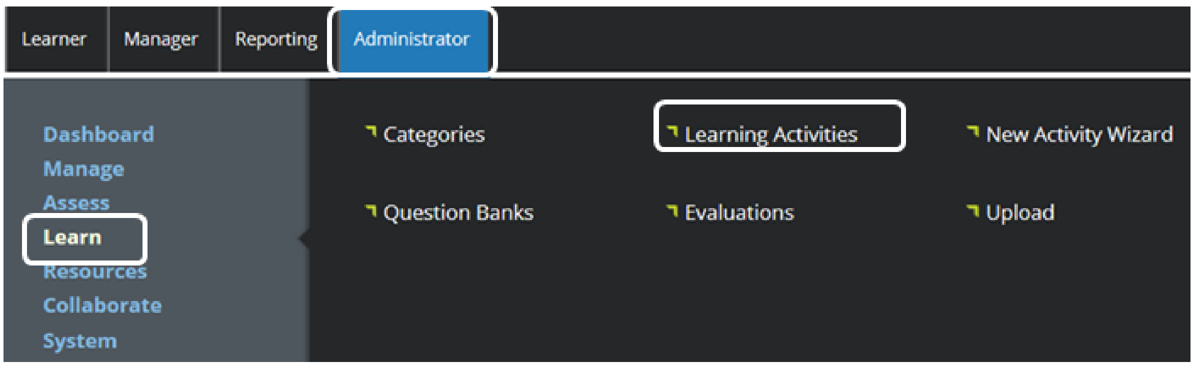
24. **Click Go to Activity Roster** to start registering learners.

Exercise 5 – Copy an ILT Class Offering

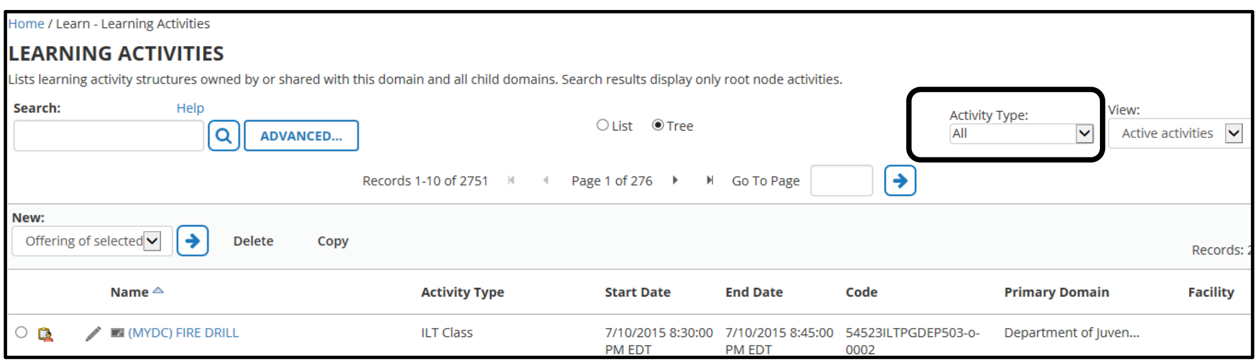
Instead of creating an ILT class from an ILT course, you can quickly make a copy of an existing ILT class for recurring training that is offered.

► To Copy an ILT Class Offering

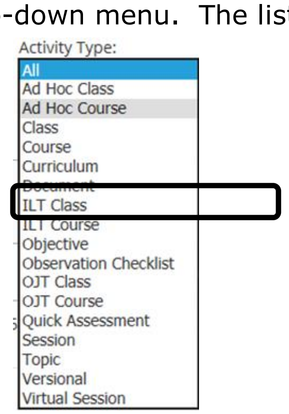
1. Hover the mouse over the **Administrator** tab.
2. Hover the mouse over **Learn** in the drop-down menu.
3. **Click Learning Activities** in the options that appear to the right of the Menu.



4. The Learning Activities page will appear.

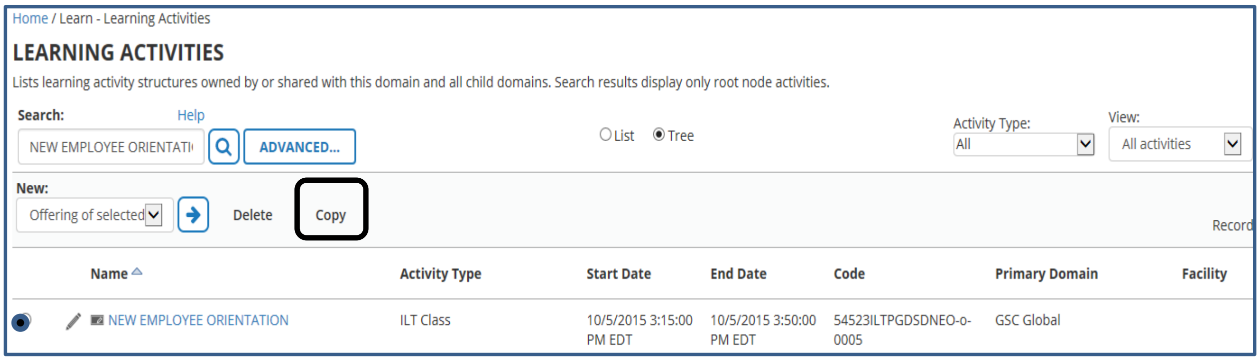


5. **Click the down arrow** next to the Activity Type box and click ILT Class from the drop-down menu. The list of ILT classes will appear on the page.

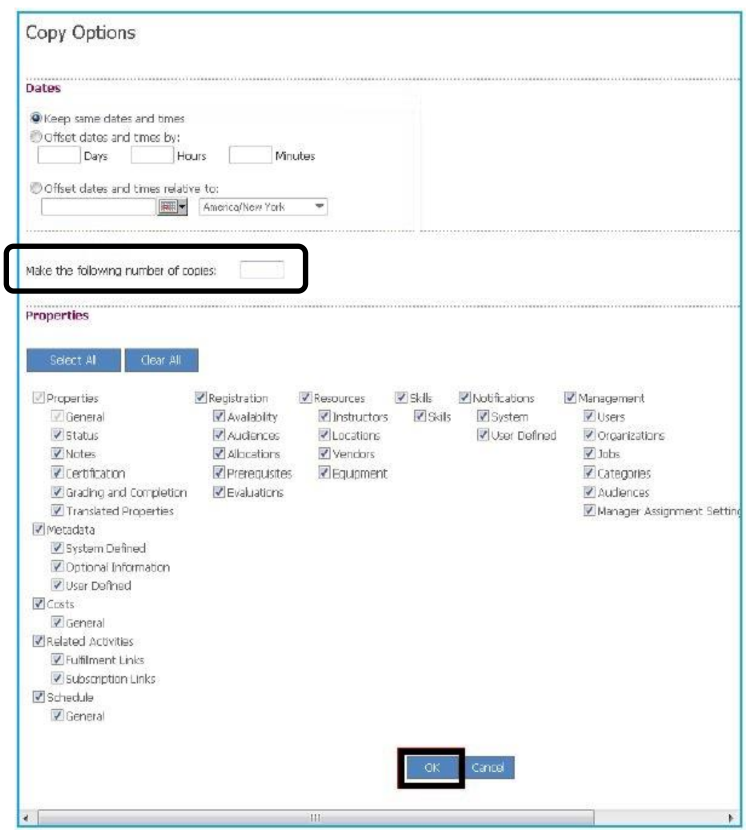


6. **Find the ILT Class** that you want to make a copy of. (You may want to use the search, or advanced search to narrow your choices.) **Click on the radio button** to the left of the ILT Class name.

7. **Click the Copy** button.

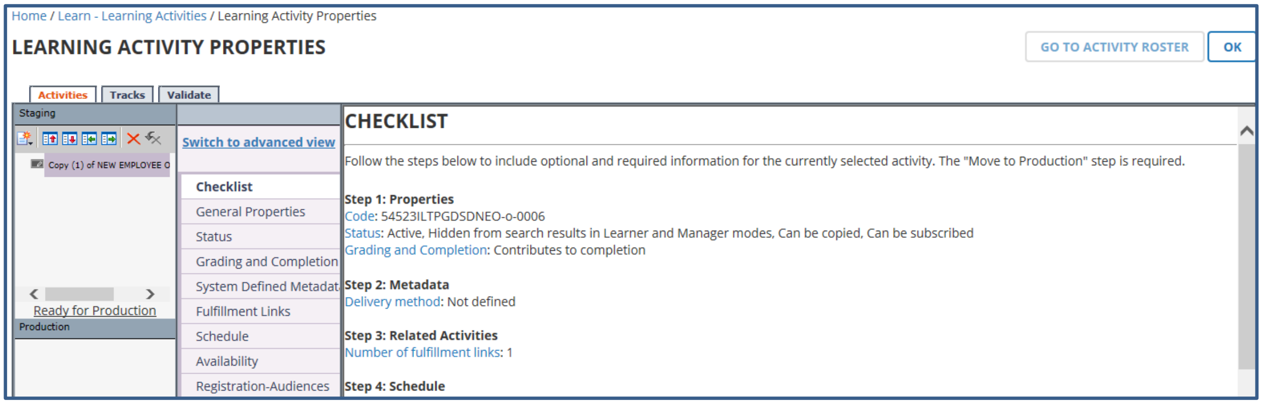


8. The Copy Options page will appear. We are only making 1 copy, **Enter 1** and **Click OK**.

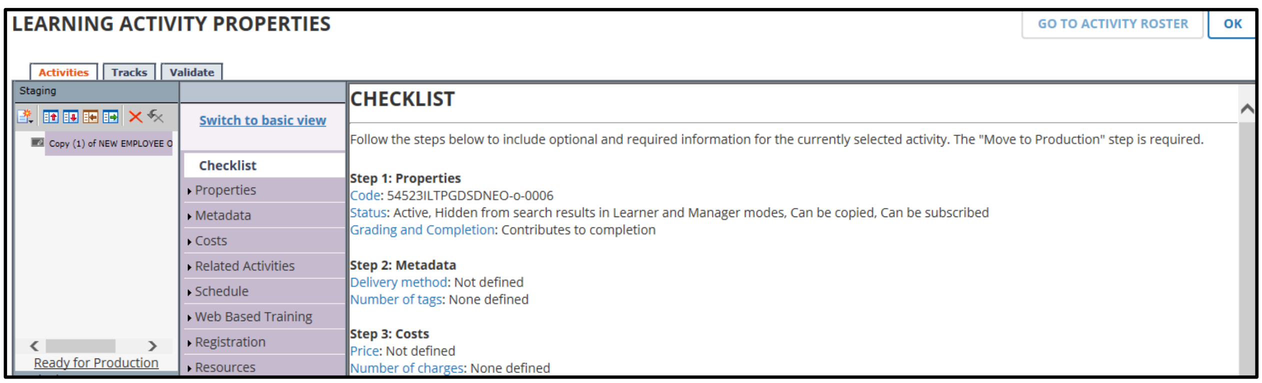


Note: If you are only making one copy of the class, the Learning Activities Properties page will appear. If you are making multiple copies, you will be taken back to the Learning Activities page that will show you a list of only your newly created copies of the classes. You will need to click on the Edit Pencil next to the name of each created copy to edit the classes in the Learning Activities Properties page.

9. Make sure the name of the class is selected. **Click Switch to Advanced View.**



10. The Advanced View of the properties will be displayed.

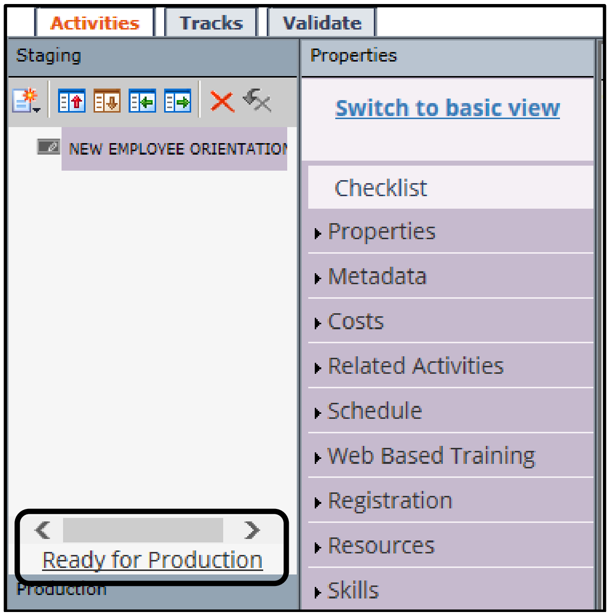


11. **Click Properties** and **General**. Delete the text "Copy of". **Click Apply**.

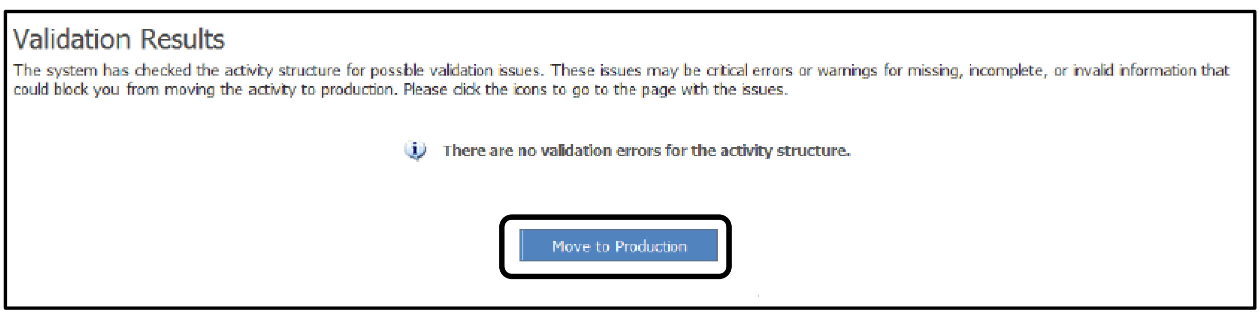
12. **Click Schedule** and **General** Make sure Start date and time as well as End date and time are correct. You will need to clear the date on each calendar before adding the new date.

13. Make any additional changes to the properties of the new class.

14. **Click Ready for Production** at the left side of the screen.



15. **Click Move to Production**



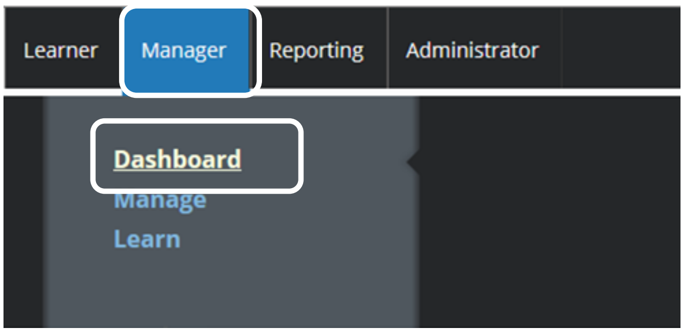
16. **Click Go to Activity Roster** to start enrolling students or Click OK to return back to the Learning Activities page.

Exercise 6 – Add Self-Reported Training to a Learner Transcript

This is a three-step process. You must first emulate the learner, add the training, then stop emulating the learner.

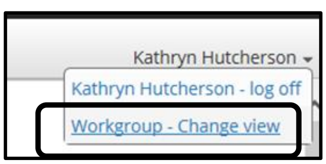
► **To emulate the learner.**

1. **Hover** the mouse over **Manager Tab**.
2. **Click on the Dashboard**.

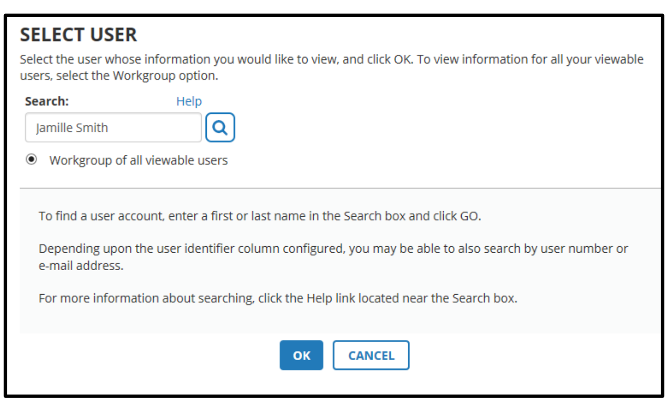


3. In the top right hand corner, locate your name and **click the drop down arrow**

4. **Click Workgroup – Change view.**



5. The Select User Screen will open. **Enter the name of the learner** you wish to add training for and click the Go button.

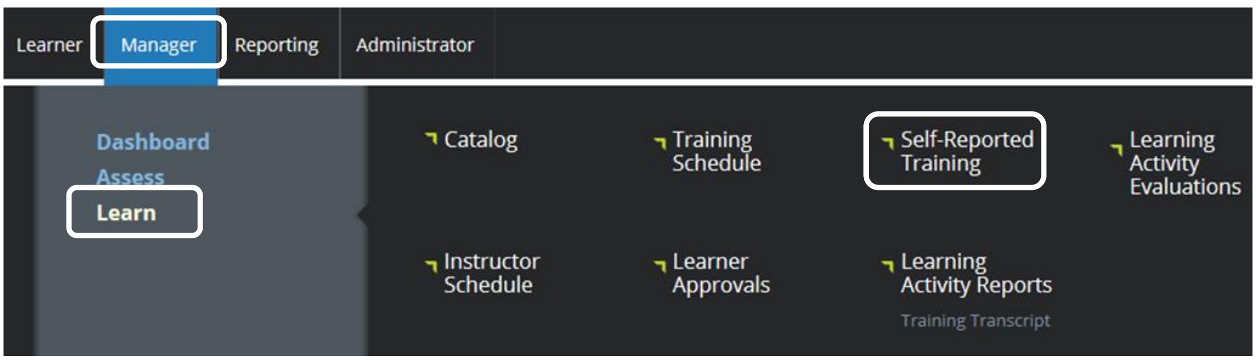


6. **Click the radio button** next to the name of the learner you want. Then **click OK**

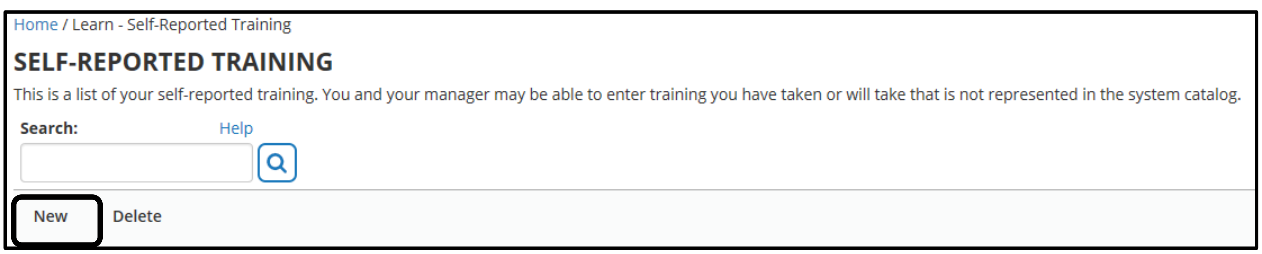
7. You can tell you are now emulating the learner by looking at the top right hand corner of your screen where you should see your name and the learner's name beside of yours.

► **To add the training activity to the Learners Transcript:**

1. **Hover** the mouse over **Manager Tab**.
2. **Hover** the mouse over **Learn.**
3. **Click Self-Reported Training**.



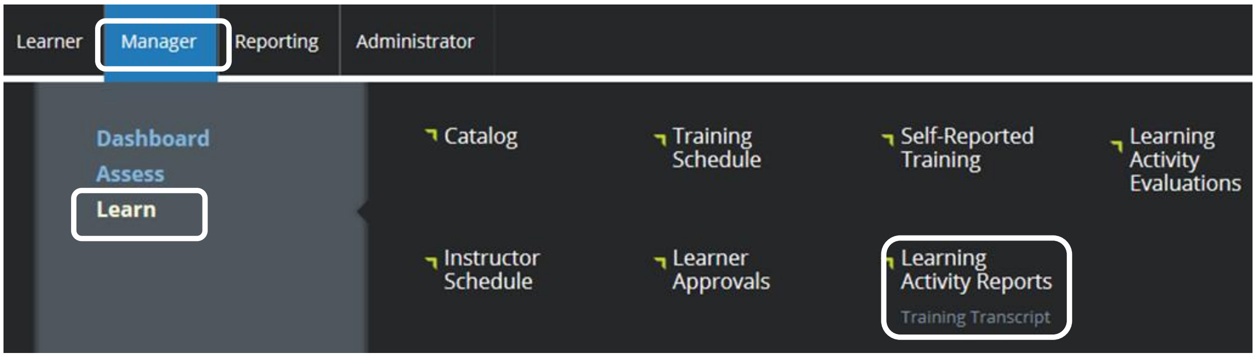
4. The Self-Reported Training Screen will appear. **Click NEW** to add the first activity.



5. **Enter the below information**
   a. **Name (Required):** Enter name of Activity
   b. **Code:** Self-Reported
   c. **Description:** Something that identifies this activity
   d. **Activity Type (Required) :** ILT Class (unless you specify differently)
   e. **Start Date & Time**
   f. **End Date & Time**
   g. **Duration:** (Enter hours)
   h. **Credit hours:** (Enter hours)
   i. **CLICK OK** to save your information

To View the Learner Transcript

6. **Hover** the mouse over **Manager Tab**.
7. **Hover** the mouse over **Learn.**
8. **Hover** the mouse over **Learning Activity Reports.**
9. **Click Training Transcript**



To stop emulating the learner

1. In the top right hand corner, locate your name (you will see the learners name beside yours). **Click the drop down arrow**

2. **Click on Switch to Workgroup View** and now you are no longer emulating the learner.

Managing Your Classes

Managing Registrations for Learning Activities

Learning Activities are **any training opportunity available to you in KELMS**. These can be any of the following:

- Digital document
- Computer based training
- Webinar
- Instructor-led course
- On-The-Job Training of any type
- Training offered by an outside vendor

After you locate a learning activity that interests you, click the **Register** button to sign up for the activity. Your Manager or proxy will be notified of your registration request. Once the Manager approves the training you will be placed in the class or activity. If it is already full you will be placed on a waiting list.

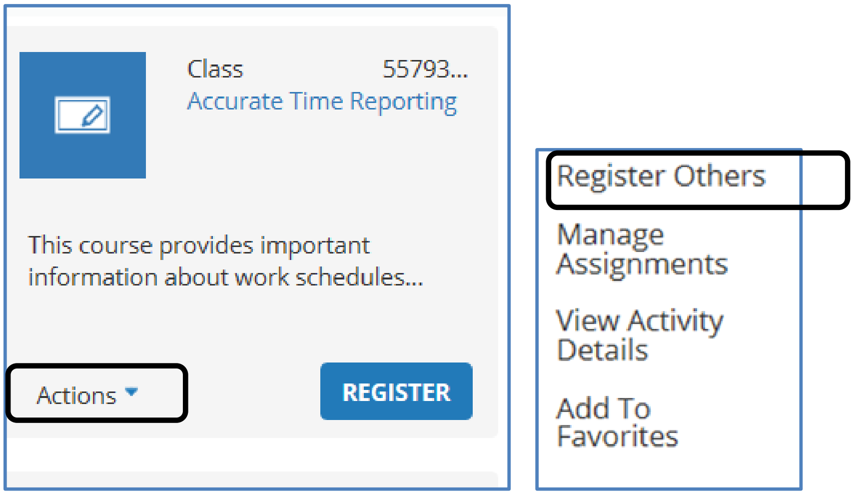
Some online activities do not require registration. The **Register** button will not appear for these types of activities.   The **Start** button will replace the register button in this instance.

KELMS includes a **batch registration functionality** that significantly **reduces the time taken to register multiple users for activity structures.** This functionality, combined with the ability to designate users as training enrollers, ensures that batch registrations are easily completed.

Understanding Batch Registration

The batch registration feature allows you to concurrently add multiple users to a training roster. There are two types of batch registration options available:

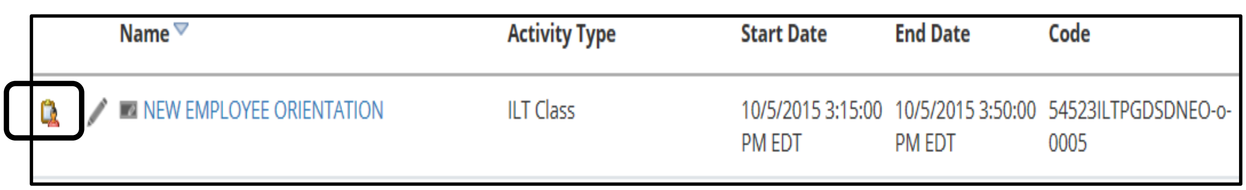
- **Register others** - This option **registers a batch of users** similar to when registering yourself for training. All registration restrictions, such as prerequisite requirements, capacity limitations, registration approval requirements, and other requirements, can be checked during this process. This is the method you use for all trainings unless you are the Instructor (Trainer).



- **Add users directly to roster** – There are three options to do this, depending on your task.

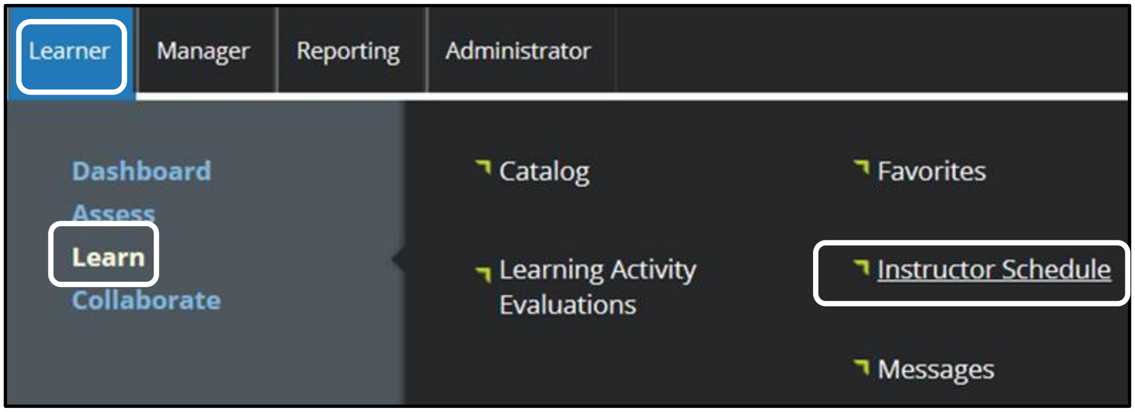
  1. If your job duties require you to create classes and register learners "after the fact" then immediately after creating the class, click on the blue **"Go to Activity Roster"** button in the top right hand corner.

  2. From the Learning Activity Page, Select the **"Manage Roster"** Icon next to the name of the ILT CLASS you are managing.(MAKE SURE that it is the ILT CLASS and not the ILT Course)

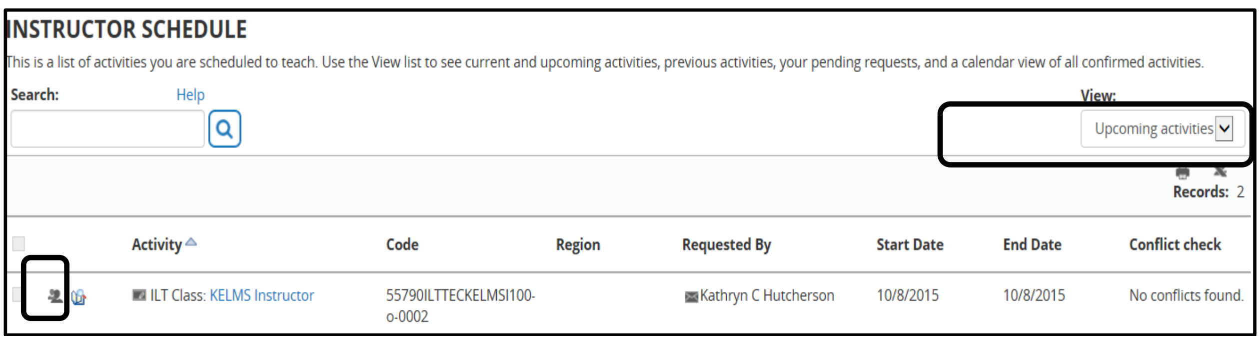


Name	Activity Type	Start Date	End Date	Code
NEW EMPLOYEE ORIENTATION	ILT Class	10/5/2015 3:15:00 PM EDT	10/5/2015 3:50:00 PM EDT	54523ILTPGDSDNEO-o-0005

3. If you are the instructor and listed as responsible, you can hover over **Learner→Learn→Instructor Schedule.**



4. **Change the view to Upcoming Activities.** A list of your upcoming activities will appear. Locate the training and click on the **"View Activity Roster"** Icon.



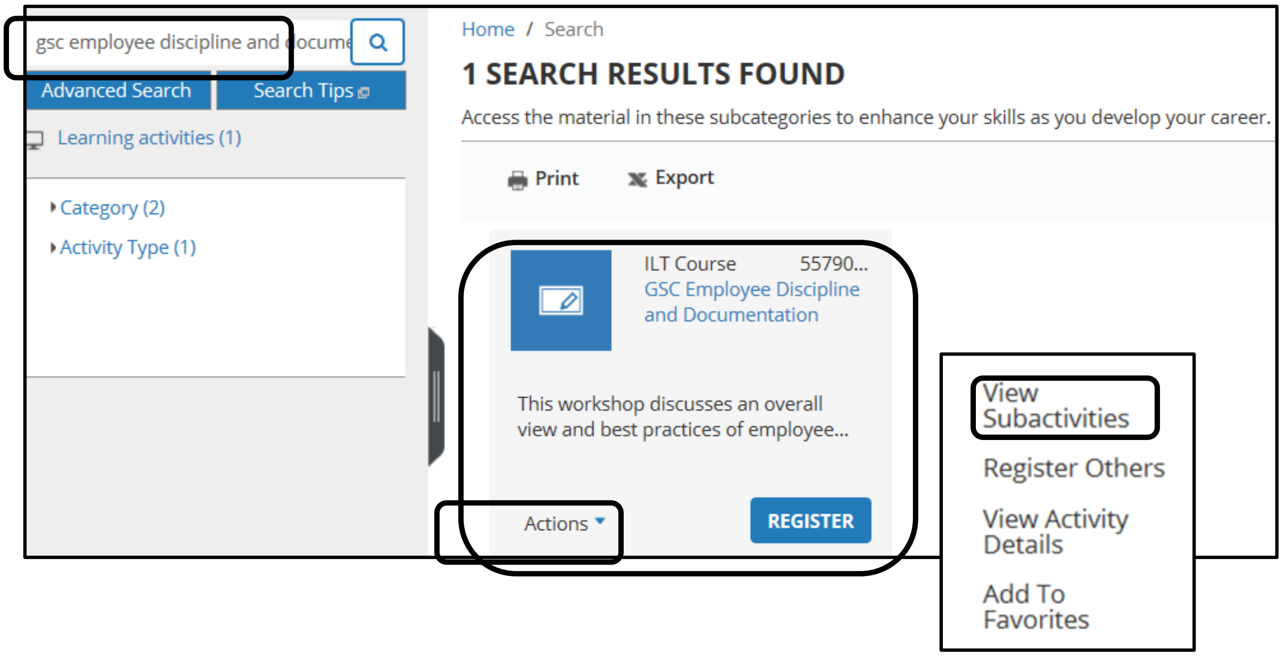
These registration options enable you to select and simultaneously register a batch of users for an activity structure by choosing or specifying:

- A **domain** or an organization (or related descendant organization) of which the users are members
- A **job** that the users hold
- A **common Manager**
- An **audience** to which the users belong
- **Users who are assigned the activity** as a requirement
- **E-mail, user number, or username**

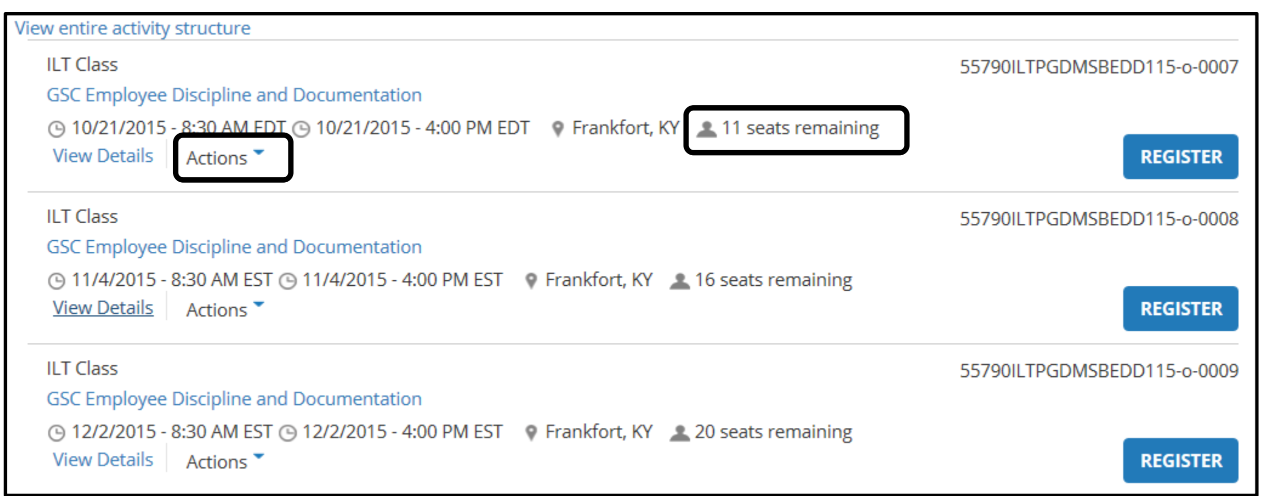
Exercise 7 – Registering Learners

► **To register learners for a learning activity:**

1. From the Learner Dashboard, **search for the Activity**. (Refer to Student Card)
2. When you locate the course/class, **Click Actions** and **View Subactivities**



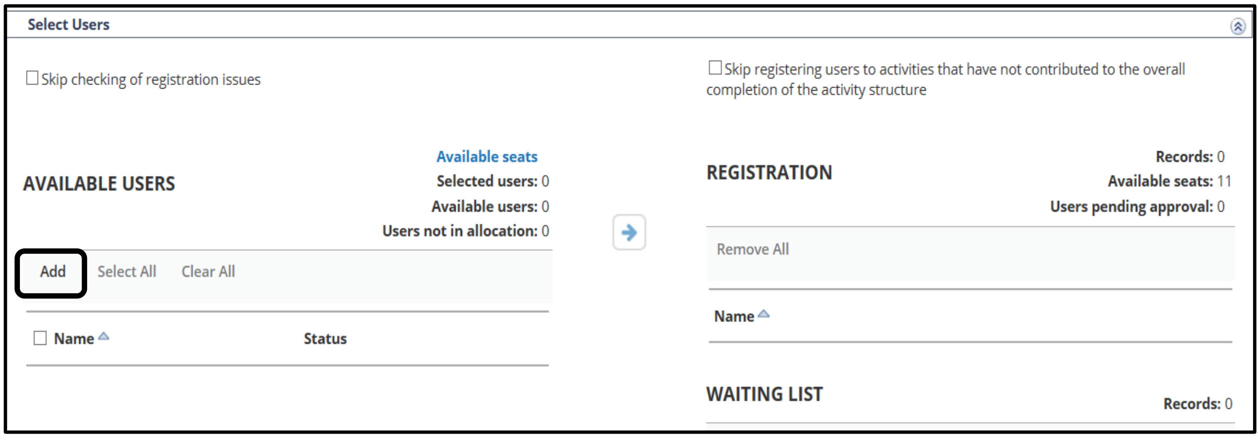
3. When the list of classes (subactivities) appears, locate the specific class that you want to register the learners. **Click Actions.** (Note: you can see the remaining seats left in the class.)



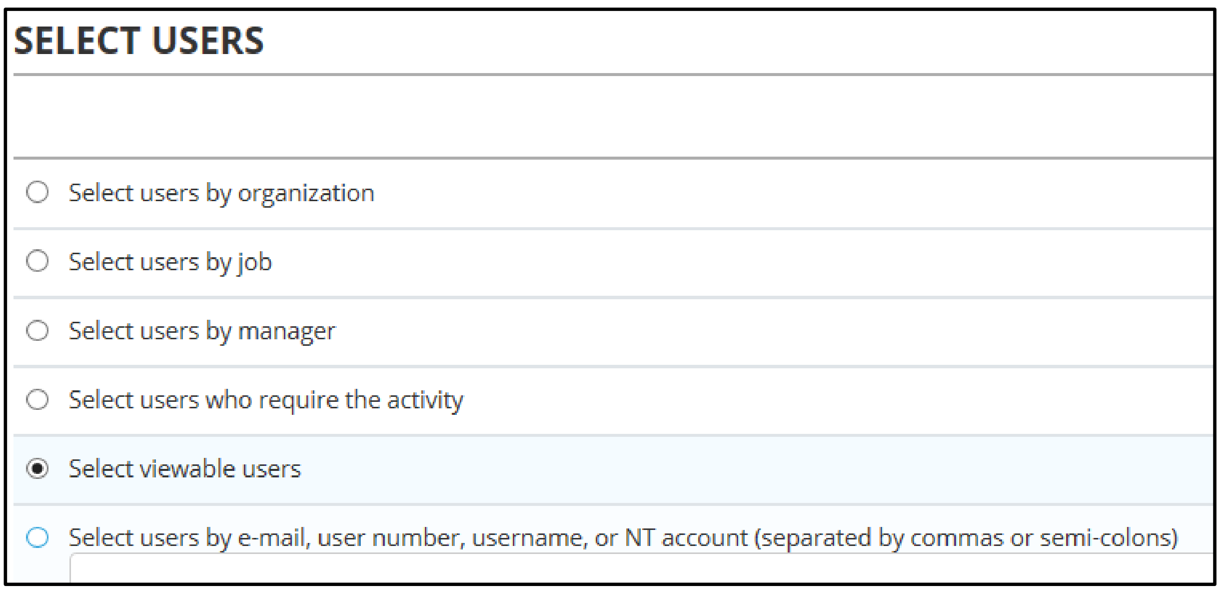
4. **Click Register Others**.

5. The Batch Registration screen will appear. You may need to select the class again, if so, **Click the specific activity you want**. **Click Continue and scroll down.**

6. Under the Available Users, Click the Add button.

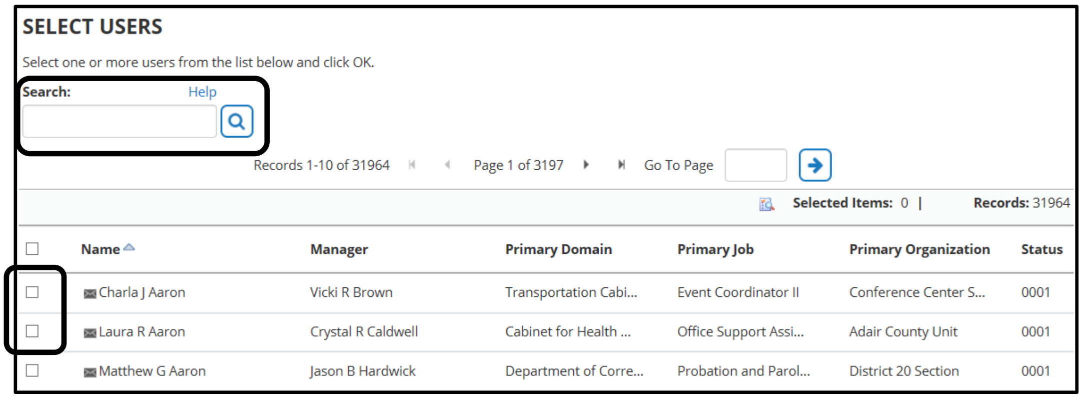


7. The Select Users page will appear. Select how you want to search for the individuals: by organization, all viewable users, etc. **Click Next**.



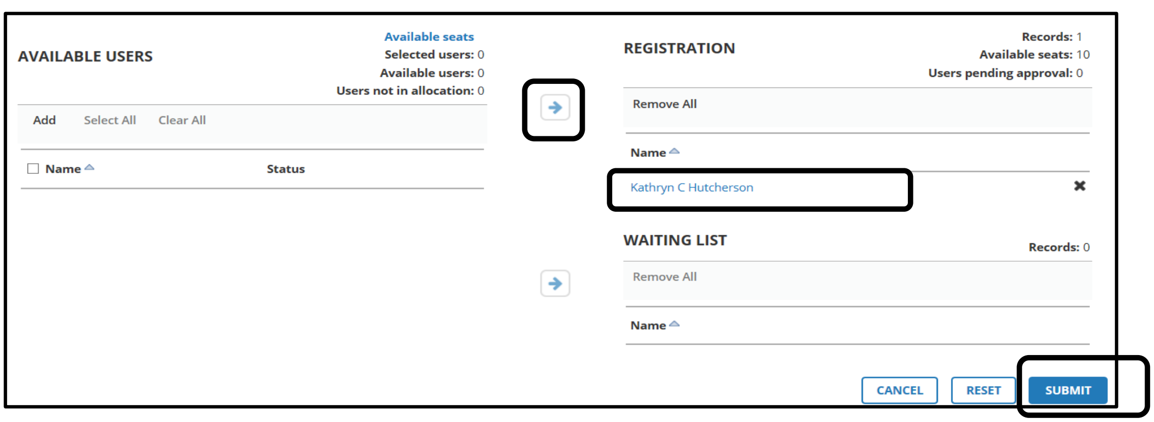
8. The Select Users page will appear. Type the learner's name in the Search box and click the Go button.  The search results will display the name. **Click the check box** in front of the name for whom you wish to register into the class. **Search for and Select another co-worker** name and **Click the checkbox by the name.** You can check multiple names at a time. (search for the name and check it, search for the next name and check it etc.). As you move from one page to another the system will remember all the names you have checked.

9. **Click OK.** All learners you selected should now appear in the available Users box on the left.



10. The learners you have added will appear in the Available Users box on the left. If you have registration issues, it will be displayed under the Status column. (A yellow hazard sign indicates a warning issue that might be a problem if there is a scheduling conflict. Red is a critical error that will stop you from moving forward. You can click on the issue link to see the details.) If you change your mind about a user, uncheck the check box in front of the user name. If you wish to start all over, click the **Reset** button.

11. From the middle of the screen, **Click the top arrow** to place the users in the Registration box. Participants will be directly enrolled in the class unless the class is already full. In that case, the Learner will appear on the Wait List.



12. **Click Submit**

13. The Activity Roster will reappear, allowing you to see the participants that have been registered for the learning activity. *Note the yellow message at the top of the screen…This is a list of users you just added to the roster*.

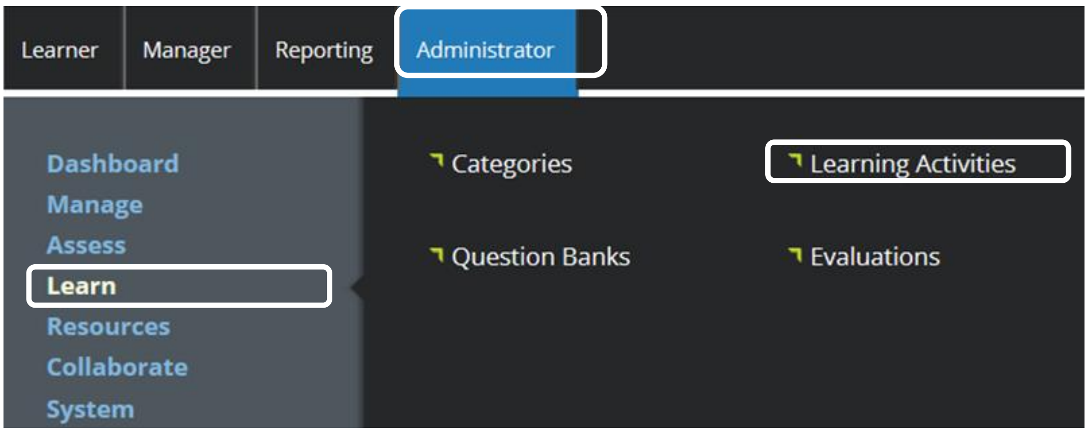
Exercise 8 – Modifying a Registration

When you create a class, you become the owner of the class and can manage the roster. As the "trainer" of the class you can also modify the roster.

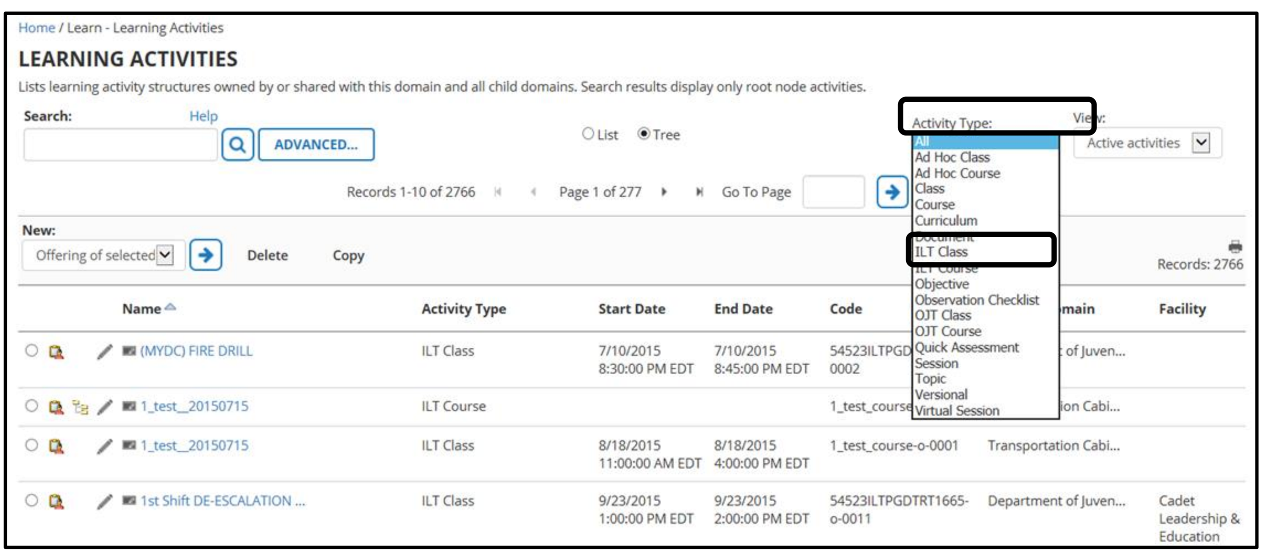
.

► To modify a registration:

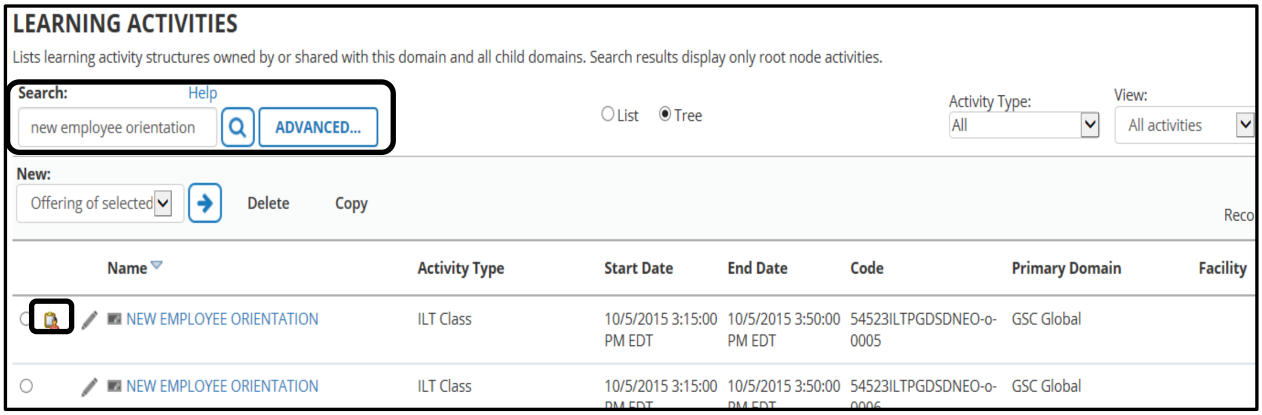
1. Hover the mouse over the **Administrator tab.**
2. Hover the mouse over **Learn** in the drop-down menu.
3. Click **Learning Activities** in the Options that appears to the right of the Menu.



4. The Learning Activities will appear. **Click the down arrow** next to the Activity Type box and **Click ILT class** from the drop down menu.



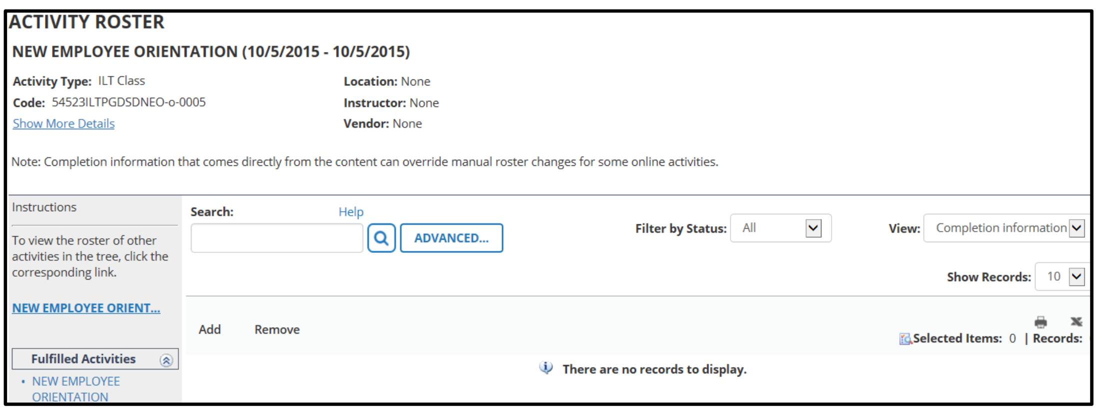
5. The system will return a list of available ILT classes. Use the Search box of the Advanced search button to search for the desired class. (Refer to Student Card) **Click Go.**



6. The search result will return a list of classes that match your criteria. **Locate your class.**

7. **Click the Manage Roster Icon** (Clip board with person) in front of the class name. If you don't see the Manage Roster button, the class has not been moved to production. You will need to click the Edit button (pencil) to move the class to production.

8. The Activity Roster page will appear. Any learners who have already registered will be reflected on the page.



From this location you can add new learners or modify the registrations. Regardless of the function you perform, a notification letter will be sent to the learner informing them of their status.

9. **Click the box** beside the Learner name you wish to REMOVE

10. **Click the REMOVE button** in the upper left hand corner.

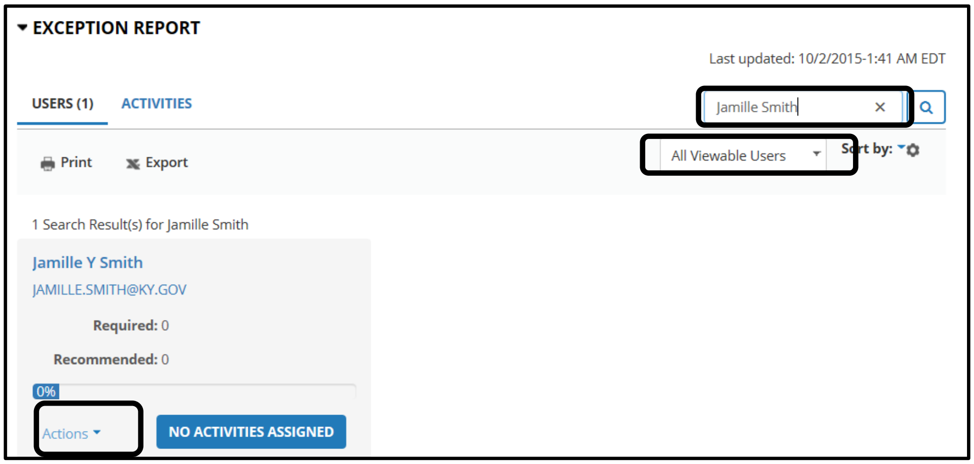
11. A message will appear asking you if you are sure you want to remove the Learner from the class. Click OK.

12. The update is made and the roster reflects that the Learner you removed is no longer registered for the learning activity.

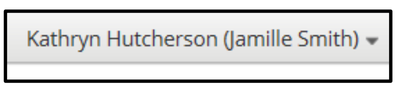
Exercise 9 – Cancelling a Learner

► **To cancel a learner you must emulate the learner:**

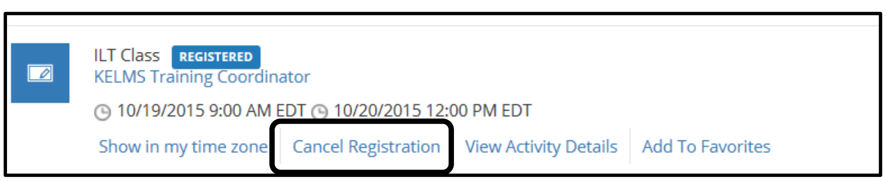
1. Hover the mouse over **Manager** and click on **Dashboard**.
2. Change the drop down on the right hand side from "**Direct Reports**" to "**All Viewable Users.**"
3. Use the "User Search" field directly above that to search for the employee's name.



4. Hover over "Actions" on the employee's tile and select "Employee View."
   NOTE: This will change your manager screen to a copy of the employee's view. You will need to change it back after cancelling the learner.



5. **Click the CANCEL REGISTRATION** link under the class you would like to cancel the person from.

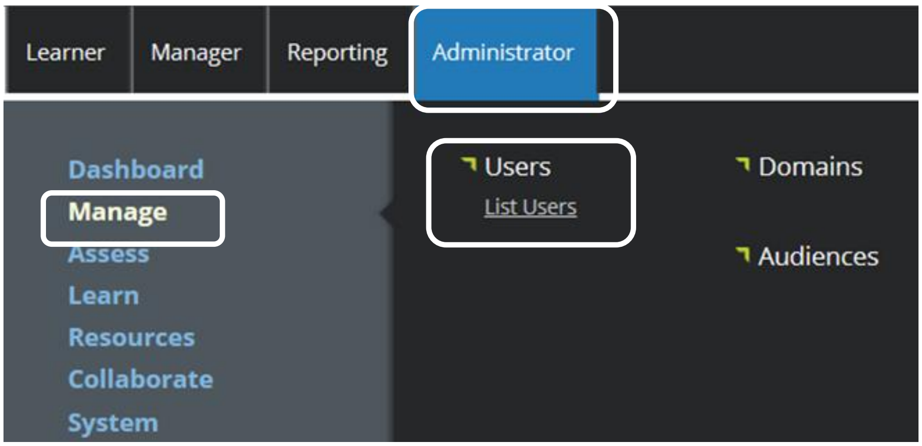


6. The Learner is now cancelled. Select, "**Switch to Workgroup View**" to stop emulating the learner.

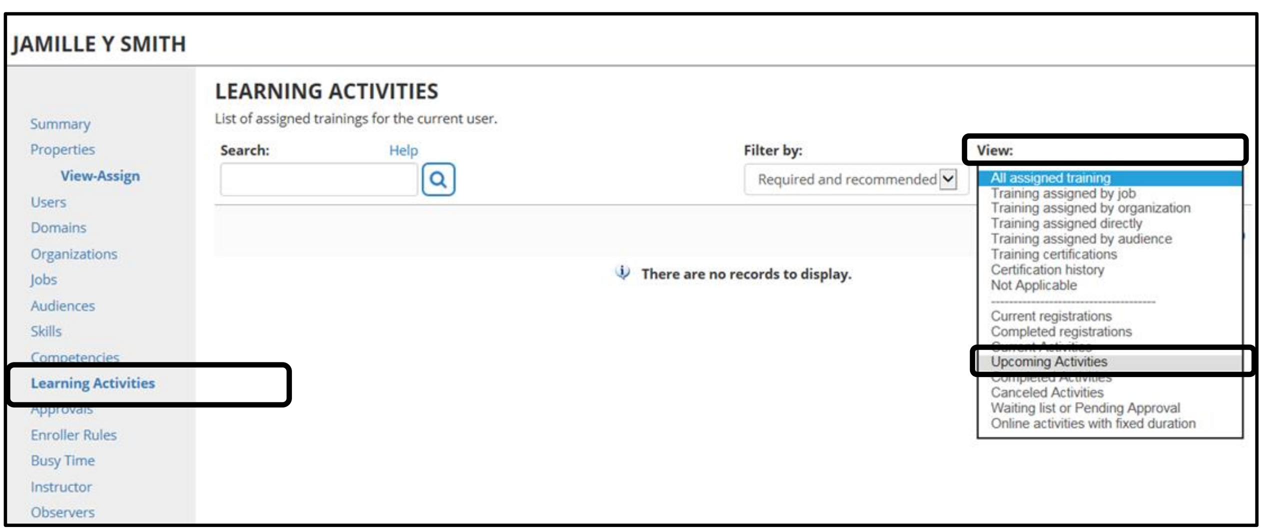
Exercise 10 – View a Learners Upcoming Activities

► To View a Learner's Upcoming Activities:

1. Hover the mouse over the **Administrator Tab.**
2. Hover the mouse over the **Manage menu.**
3. Hover the mouse over **Users.**
4. **Click on List Users.**



5. The user search screen will appear. In the search box, **enter the learner name, employee id or email address of the person you want to find. Click Go.**
6. **Click on the learner name** to open the User Summary Page
7. **Click on Learning Activities** in the Summary Box.
8. **Select your View** on the right hand side of the screen **Choose Upcoming Activities** to see all the upcoming classes.

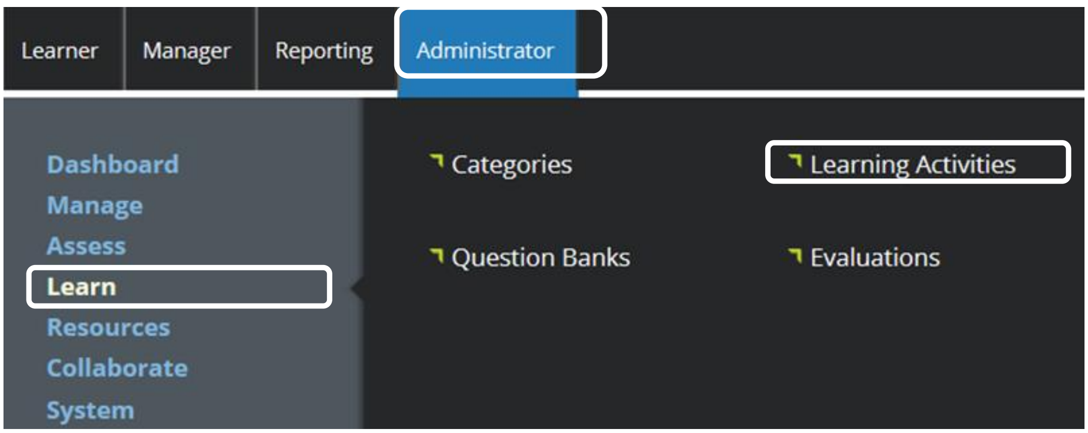


Exercise 11 – Marking Completions

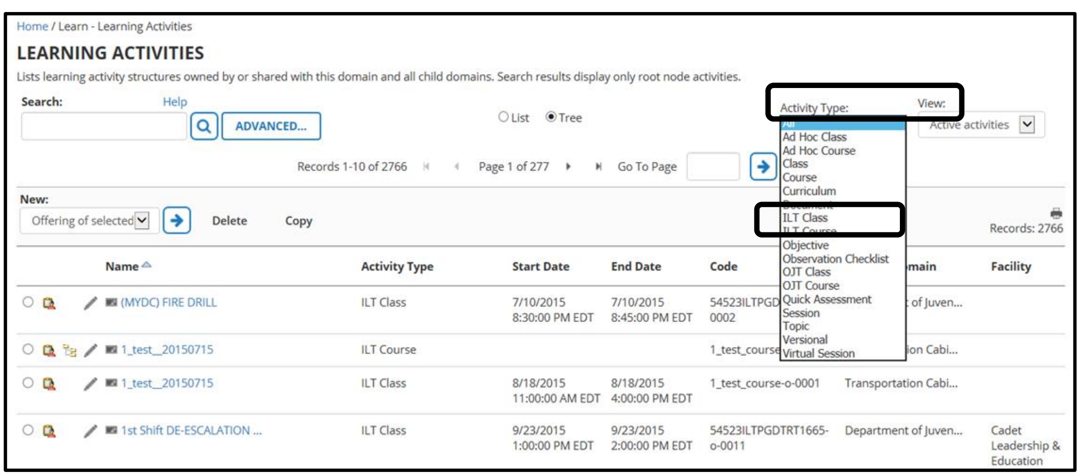
In addition to marking attendance you can also set the completion status for a user's participation to Yes or No. You can also view each participant's completion date, score, and attendance status. Remember you must own the class or be the trainer of the class in order to mark completions.

► **To enter a user's completion status for a learning activity:**

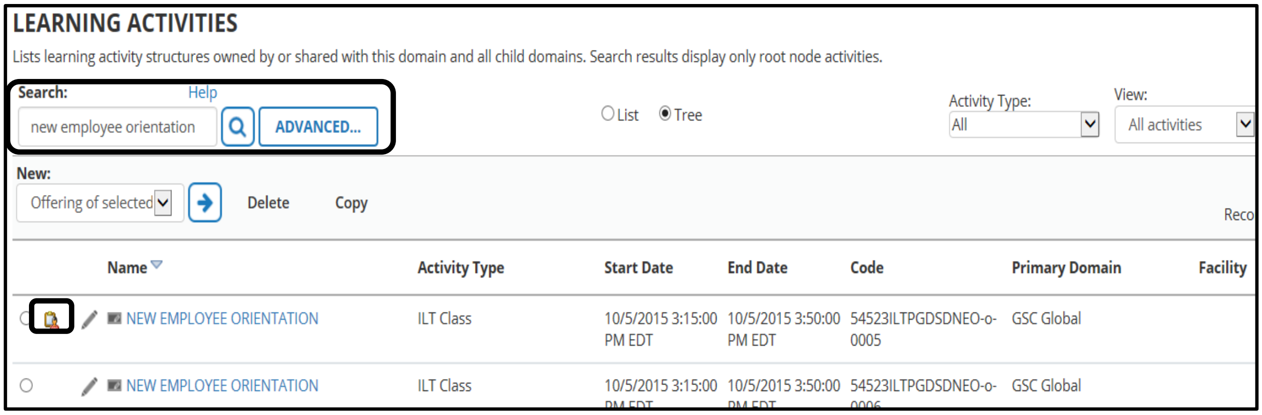
1. Hover the mouse over the **Administrator tab.**
2. Hover the mouse over **Learn** in the drop-down menu.
3. Click **Learning Activities** in the Options that appears to the right of the Menu.



4. The Learning Activities will appear. **Click the down arrow** next to the Activity Type box and **Click ILT class** from the drop down menu.

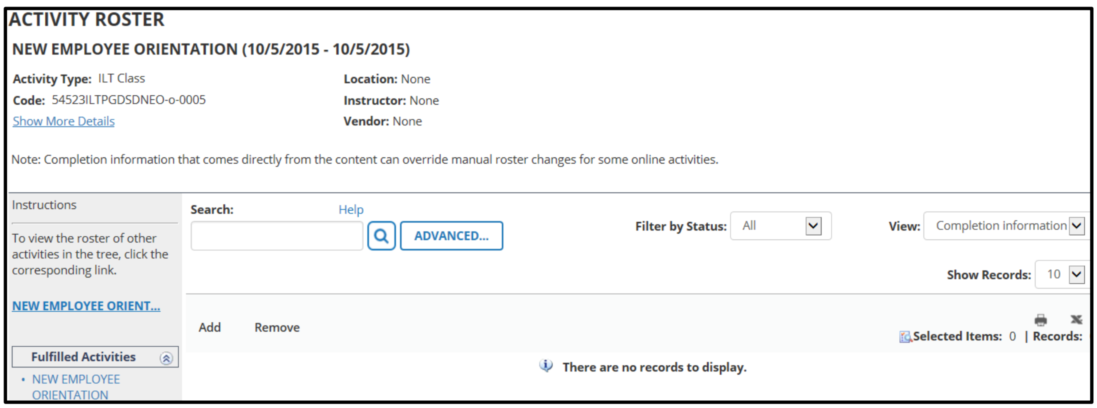


5. The system will return a list of available ILT classes. Use the Search box of the Advanced search button to search for the desired class. (Refer to Student Card) **Click Go.**

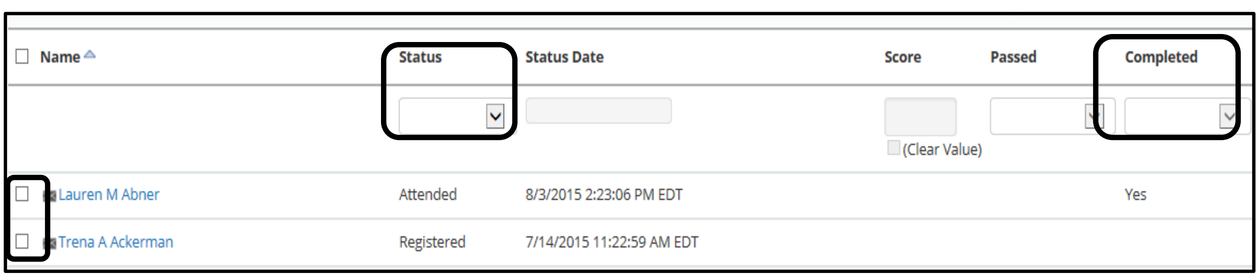


6. **Locate your class.**

7. **Click the Manage Roster Icon** (Clip board with person) in front of the class name. The Activity Roster page will appear reflecting all learners scheduled in the class.



8. Check the box in front of name of each learner who attended the class.
9. Click the drop down box under status and change the status to Attended.
10. Click the drop down box under Completed and change the status to Completed.

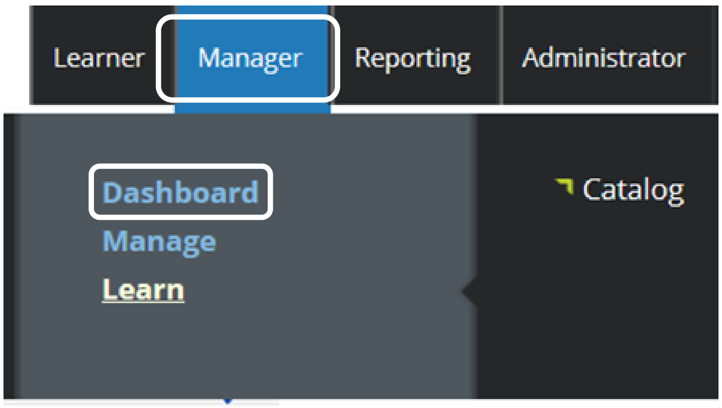


11. Click Apply at the bottom to save changes. You will be asked to confirm that you want to make this change. **Click OK.** Double check to ensure there are no learners with a registered status left on the roster.
12. Don't forget to ensure there are no learners left on the waiting list.

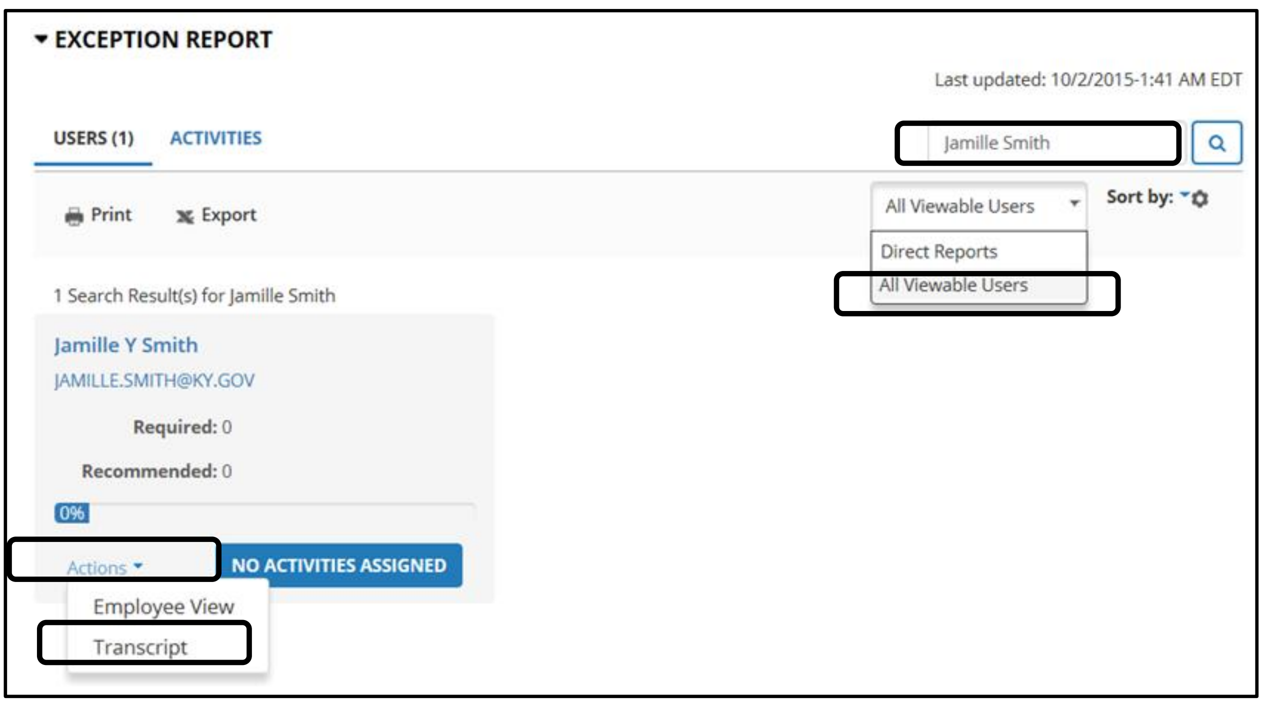
Exercise 12 –View Learner Transcript

►To view Learner's Transcript:

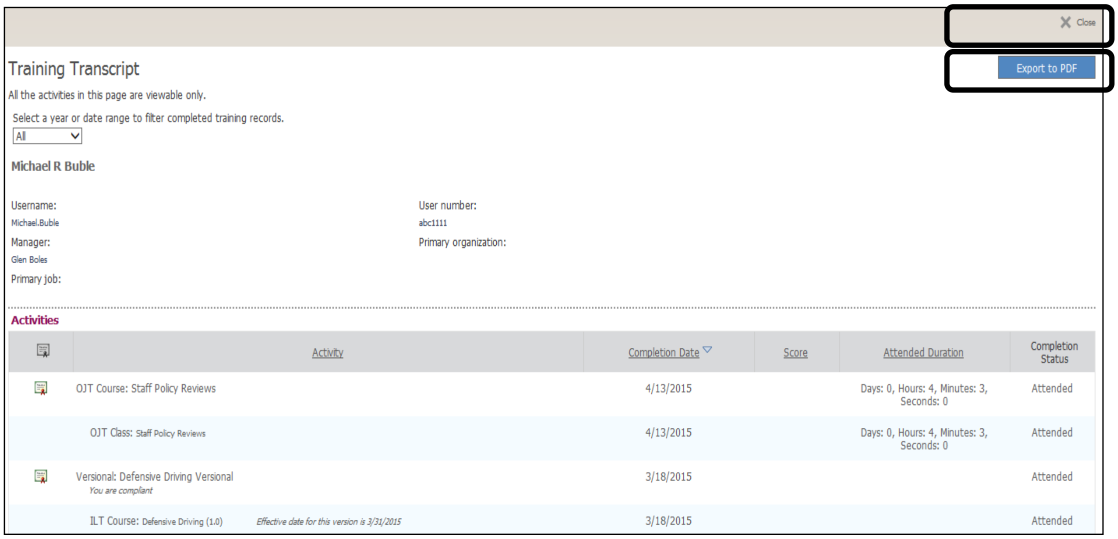
1. Hover the mouse over the **Manager Tab.**
2. **Click on Dashboard.**



3. Change Direct Reports to **All Viewable Users.**
4. In the User Search box, **enter learner name** (Refer to Student Card).
5. The **learner tile will appear**
6. **Select Actions>Transcript**



7. You can now **view the transcript** and have the option to **export it to PDF** (See export button in top right hand corner of screen)

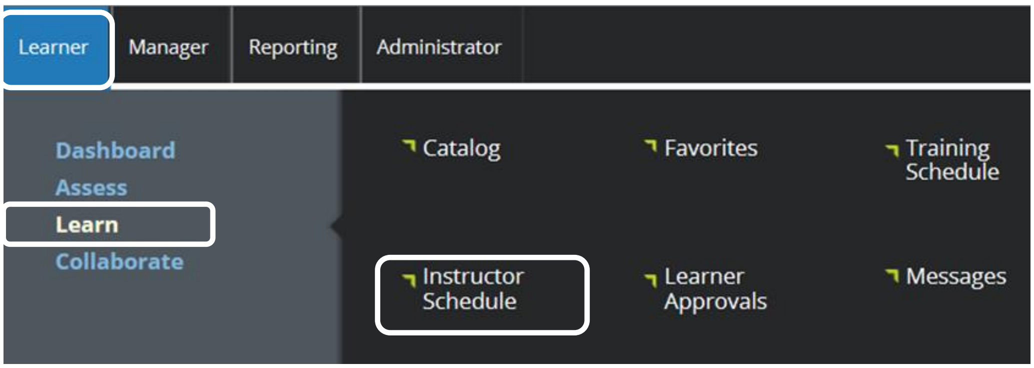


8. **Click the close button** above the PDF Button to return to the Exception Report.

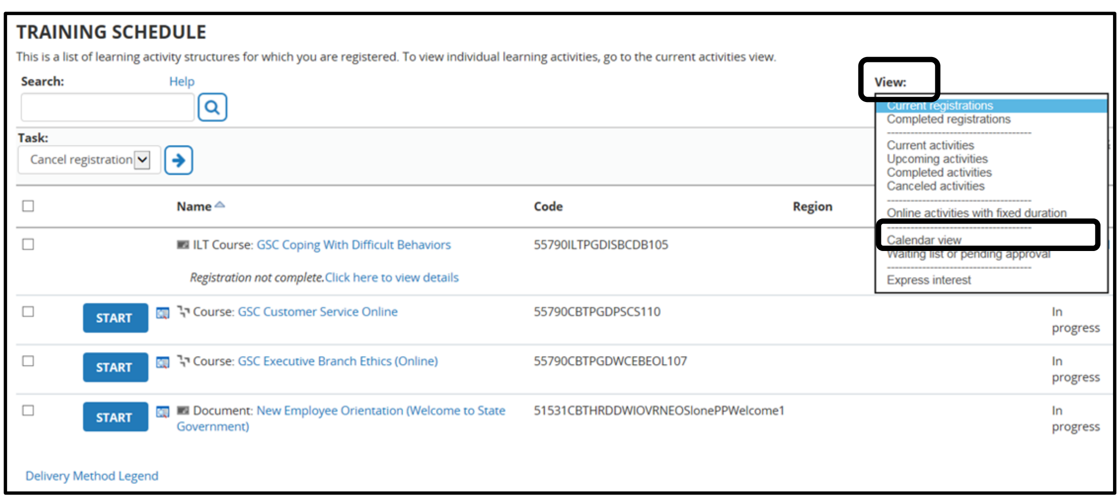
Exercise 13 – Viewing Your Instructor Schedule

► **To view your instructor schedule:**

1. Hover the mouse over the **Learner** Tab.
2. Hover the mouse over the **Learn** Menu.
3. Click on **Instructor Schedule**.



4. Select one of the following from the **View** list on the far right hand side of the page:
   - **Current activities** - shows the current activities you are scheduled to teach.
   - **Previous activities** - displays activities taught in the past.
   - **Pending requests** - lists the activities you are requested to teach. Approval for this request is still pending.
   - **Calendar** - displays the instructor schedule in an interactive calendar view.
   - **Upcoming activities** - shows future activities.



5. **Choose Calendar View**

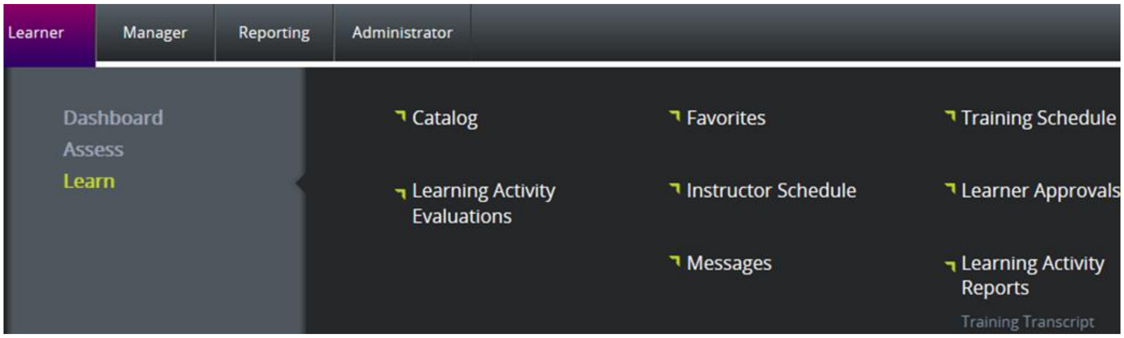
Generating Roster Reports

You can generate the following reports from the Activity Roster page:

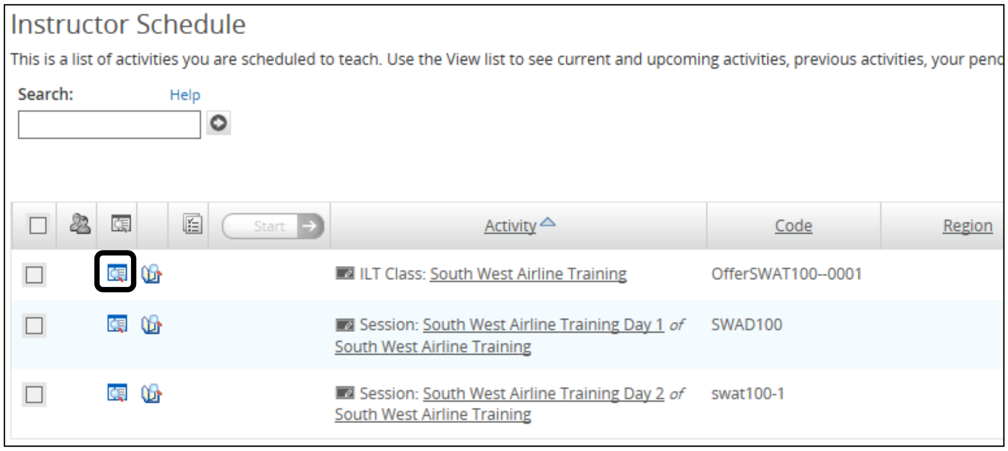
- Activity Completion Report
- Activity Evaluation Report: An evaluation report shows the responses that people have entered for a specific learning activity.

► To Generate Roster Reports:

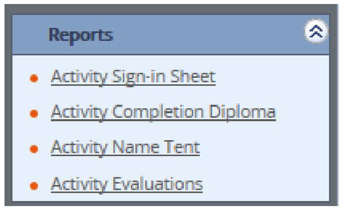
1. **Hover** the mouse over the **Learner tab**
2. Hover the mouse over the **Learn Menu**
3. **Click on Instructor Schedule**.



4. **Locate** the activity and **click the magnifying glass** icon.



5. On the sidebar, under reports, **select the report you want to generate**.



6. Select Activity Completion **Diploma**.

Helping Your Manager

On-The Job Training

With appropriate permissions, Managers can use On-the-job training (OJT) to observe and track a user‘s proficiency in a specific training required for the job. You can manage OJT Courses and OJT Classes that you create.

For OJT Courses:

- You can register users and manage the roster from the **Manager Exception Report** and from **Search** results.
- You can register users from the **Detailed Exception Report by User** if the direct report is not registered. Else, you can manage the roster from the **Other Actions** link.

For OJT Courses and Classes:

- You can manage OJT Classes, register users, edit OJT Class assignments, and manage the roster from the **Manager Exception Report** (from the **Activities** tab) and from **Search** results by clicking on the **Other Actions** button.
- You can register users from the **Detailed Exception Report by User** if the direct report is not registered. Else, you can manage OJT Classes from the **Other Actions** button.

Creating an OJT Class

As a Manager, with appropriate permissions, you can create an OJT Class, edit and delete an OJT Class and manage the roster of an OJT Class that you own. The audience for the OJT Class you create will default to the OJT Course audience.

Proxies

Managerial functions for a group of users may suffer delays if Managers are unavailable. In such scenarios, it is important to ensure the employee training is not adversely affected. To do this, you can delegate all the training task management for the team to another user, or a member of the team. KELMS offers the Proxy Relationship features for you to designate another user to act on his behalf for a limited period of time or indefinitely.

You should have appropriate permissions to be able to assign a proxy relationship.

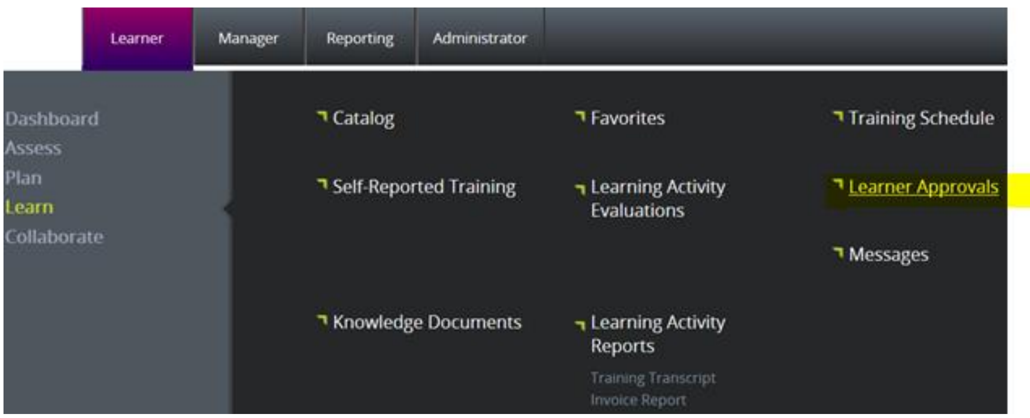
Approvals

Sometimes, your direct reports need your approval to register for a learning activity. You can view a list of the approval records for learning activities that any selected user has registered to take.

Approve Training Requests

► To approve training requests:

1. From **Learner Click on Learn>Learner Approvals**.



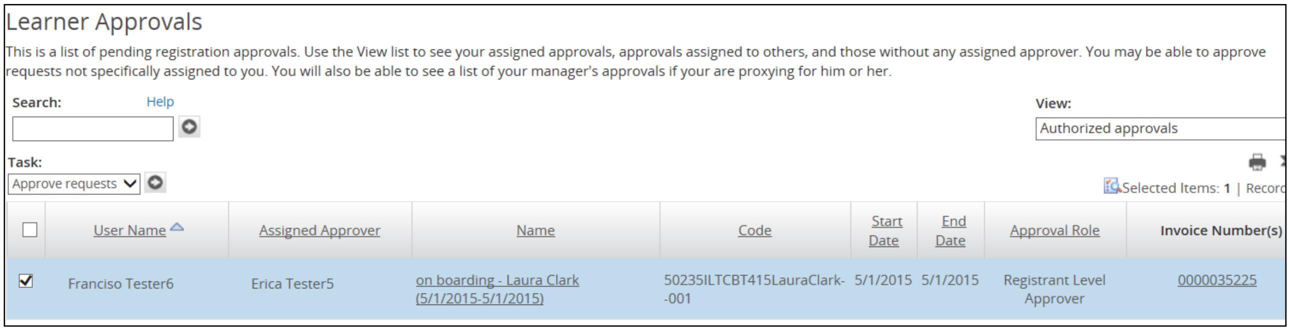
2. **Select** the appropriate approval view (**Authorized Approvals**) from the **View** list on the right hand side of the screen.

This will allow you the opportunity to see your assigned approvals, approvals assigned to others, and those without any assigned approver. You may be able to approve requests not specifically assigned to you. You will also be able to see a list of your Manager's approvals if you are proxying for him or her.

The screen will return a list of pending registration approvals.

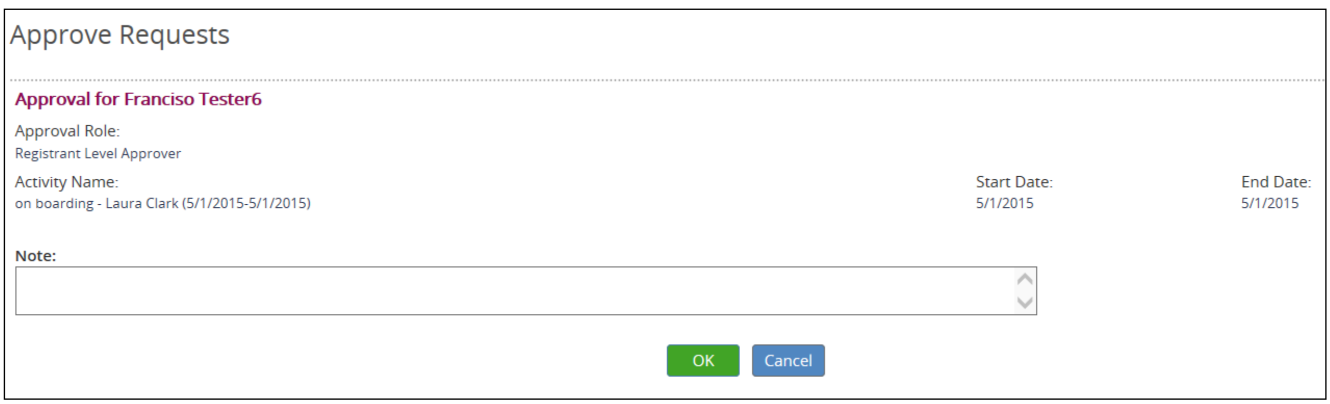
3. **Select the check box** beside the request you want to approve.
4. In the Task list, select **Approve Requests**.

5. Click .



6. [Optional] Enter any notes regarding the approval.

7. **Click OK** to accept the request.



Notifications - Letting the Users Know

Using Notifications

KELMS offers over 90 different system e-mail notifications that alert Learners, Instructors, and Training Coordinators when certain events occur in the system. These events can be schedule by you or triggered by something that happens in the system. Because they are automatic, the notifications feature saves Administrators hours of time that would be spent manually tracking and sending emails to Learners. Once you set up a notification, it functions on its own until you need to change it.

By default, all users in the system inherit 11 notifications which can be deactivated for classes that you create as an Instructor. The notifications are as follows:

Notification Name	Notification Template
Evaluation - Learning Activity Registration Notification	KELMS Evaluation - Learning Activity Registration Template
Learning Activity Cancellation Notification	KELMS Learning Activity Cancellation Template
Learning Activity Changed Notification	KELMS Learning Activity Changed Template
Learning Activity Completion Notification	KELMS Learning Activity Completion Template
Learning Activity Reminder Notification	KELMS Learning Activity Reminder Template
Registration - Smart Waiting List Notification	KELMS Registration - Smart Waiting List Template
Registration - Waiting List Addition Notification	KELMS Registration - Waiting List Addition Template
Registration - Waiting List Notification	KELMS Registration - Waiting List Template
Registration Cancellation/Deletion Notification	KELMS Registration Cancellation Template
Registration Confirmation Notification	KELMS Registration Confirmation Template
Registration No-show Notification	KELMS Registration No-show Template

To deactivate a notification in your class, check the box beside the notification. Change the drop down under task to Inactivate Notifications. Click the Go button.

Technical Support

What do you do when you don't know what to do?

Training Coordinators are your first point of contact to reset passwords and deal with technical issues.

If you are working in KELMS and receive an error message, please provide the below information to your Training Coordinator so they can research the issue.

1. Course details (course name, date, or code of the activity you are working in)
2. Include the name of the user experiencing the problem
3. Steps the user was performing when the problem happened
4. Screenshot of the error message

If your Training Coordinator is not available you may send an email to the KELMSDSCGroup@ky.gov mailbox where someone will assist you. Please follow the above instructions to clearly identify the problem. Also ensure that you cc: your Training Coordinator so they are aware of the issue you are experiencing.

Important Reminder:

New law in effect January 1, 2015

- A person's name in combination with an account number along with a password that provides access to KELMS is considered personal information.
- Any use of an employee's name along with the Employee ID should be treated as sensitive information both in electronic and printed form.
- Always remember to use Entrust to encrypt email containing confidential information – this includes screen shots.
- If you do not have Entrust set up in your Outlook mail, please contact your manager about having it installed in your email.

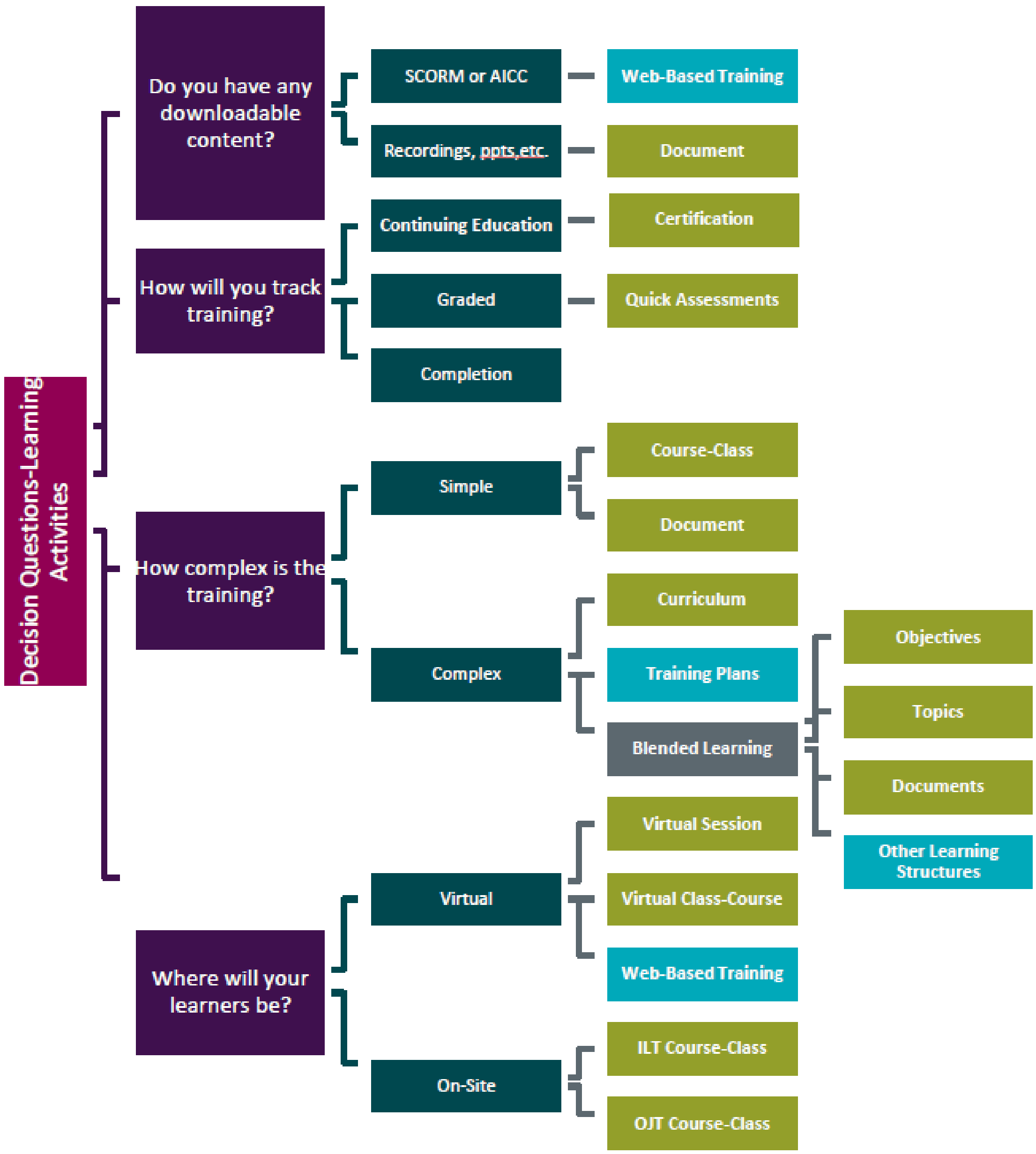
KELMS Access

Within 1-2 days of completion of this class, you will receive an email from the KELMS System Administrator granting your access to KELMS. Your name will be added to a global email distribution list so that you can keep up to date with details regarding the KELMS system. Do not share your login information with anyone.

If you or another co-worker who has access to KELMS will be transferring to another position or terminating your employment, it is vital that you inform your Training Coordinator so that the proper paperwork can be completed to remove your access to the system and make arrangements to train and set up security for the new user.

Reference Material

Learning Activity Creation Guidelines



Reference-Important Functions and Terms

Audiences

Audiences control user access to learning activities in Learner and Manager Modes. Every learning activity offered in KELMS is designed for a target group of users. The target group for any learning activity can be every employee of an agency, members of an agency division, employees working for a common job, newly hired employees, promoted employees, or a specific list of employees in an agency.

Audiences limit who can register for trainings, or can allow you to assign activities to a specific group of people.

Every learning activity in KELMS must have at least one associated audience to determine the Learners who can access it; otherwise, the activity is not visible to any Learner. By defining audiences and associating them with a learning activity, you can control the Learners who can:

- View the learning activity in the training catalog
- Register for the learning activity
- Occupy a seat on the learning activity roster
- View reports
- Be assigned a learning activity

In KELMS, an audience is defined using a set of filtering rules that are used to control various aspects of learning activities.

Audiences are defined using rule sets. **Rule sets are groups of rules that determine the members of an audience.** This rule-based architecture allows you to define sets of users based upon different parameters such as their job, organization, Manager, managed users, and more.

Every audience consists of at least one rule set. When multiple rule sets are added to an audience, users must meet the requirements of any one rule set to qualify as a member of the audience. If you have the need to create an audience, please contact your Training Coordinator to have them create the audience for you.

Curriculums

A Curriculum defines a learning path that identifies the required objectives and the order in which these objectives should be completed. You can use a Curriculum to:

- Organize different learning activities into a hierarchy to create an activity structure.
- Track variety of learning activities towards a single learning goal.
- Map a single record source for a variety of learning paths for a specific training subject. For example, a Learner can take an ILT course, an online course or an assessment to meet the completion criteria for a single subject.

When a curriculum is created, it makes a copy of the activities or offerings that make up the curriculum. When a Learner is registered to a curriculum, they register for this copy as well as the original roster of the activity itself. If a change is needed to the status of an activity in a curriculum, the Training Coordinator or Instructor would need to look at the roster of the actual standalone activity to make the choice.

When the activity in a curriculum is activated, the Learner uses this copied activity to manipulate the real activity, and the status of the real activity is passed back to the copy, which has the curriculum completion rules, etc, as properties that may need to be satisfied. By creating a copy of an activity for the curriculum, the system allows multiple curriculums to use the same activity for more than one structure.

This is why dual registrations appear for any activity that is in a curriculum structure and is not typically an error with the system.

Resources and Assignments

Assigning Resources

Training resources, such as vendors, facilities, locations, and equipment, refer to items that are required to deliver training. Some specific examples of resources include training rooms, instructors, computers, and overhead projectors. In addition to training delivery resources, you can set up other resources such as purchase orders and notification templates.

By managing training resources, you can ensure that your enterprise's training delivery logistics are well coordinated.

Before you begin to schedule training, you must enter all resources and select them when you schedule learning activities. Automatic conflict checking ensures that resources are not overbooked.

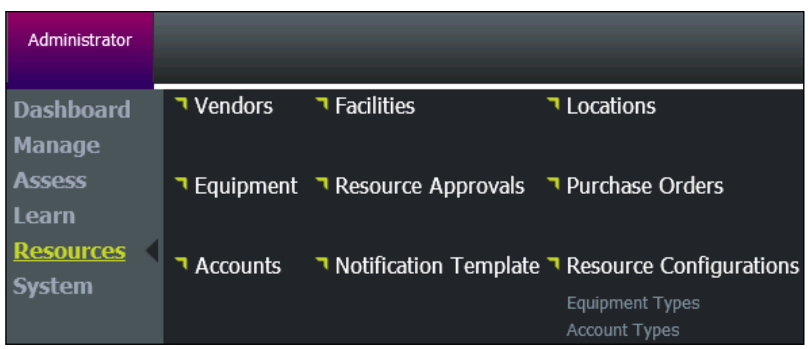
Viewing Resources

You can view all the resources that belong to your domain or to any of its child domains.

Note: Viewing or updating resource details can be completed only in Administrator mode.

The **Resources** menu includes the following options:

- Vendors
- Facilities (*identifies the building)*
- Locations (*identifies the specific location*)
- Equipment
- Resource Approvals
- Purchase Orders
- Accounts
- Notification Templates
- Resource Configurations



To view resources, click an option and browse through the available resources from the **Resources** menu.

KELMS Course Code Development

KELMS Learning Activity Code Standard

This standard is to be adhered to for any course, class, and activity which is entered into KELMS. Any learning activity included in KELMS is required to have a Learning Activity Code in accordance with the following alpha numeric structure. It is composed of: Cabinet and Agency, Delivery ethod, Category/Type, and Agency Code.

Cabinet & Agency	Delivery Method	Common Category/Types
5 digit numeric	3 alpha	3 Alpha
Required	Required	Required
57886	ILT	TEC

Cabinet and Agency Code

1. *First two numbers is the cabinet identifier*
2. *Last three numbers is the agency identifier*

Delivery Method Acceptable Codes

1. *Instructor Led Training (ILT)*
2. *CBT (OLT)*
3. *Blended Learning (BLE)*
4. *Meeting (MTG)*
5. *Webinar (WEB)*
6. *Conference (CON)*
7. *Acknowledgments (ACK)*
8. *On the Job Training (OJT)*
9. *Curriculum (CUR)*

Common Category Types Acceptable Codes

1. *Human Resources (HR)*
2. *Information Technology (TEC)*
3. *Professional Growth and Development (PGD)*